



matchIT User Manual
Version 6

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Important Notice

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Preface

This is the User Manual for matchIT version 6.0. See the Getting Started Guide for an introduction to the main features of matchIT. For more in-depth information on some topics, refer to the Online Help.

Not all sections of this manual may apply to your copy of matchIT. If you would like further information about any of the modules you do not currently have, contact your supplier (see "[Contact Us](#)").

General Operating Techniques

Using Online Help

For Windows-style help while matchIT is running, access the Help menu. About matchIT will display which version of matchIT is installed. Using the Windows-style help, it is possible to use the contents or index tabs to find a topic and also search for a keyword.

See also:

- "Problems"
- "Further Information"

Basic Navigation

Menus

Menus follow Windows standard usage. All of the toolbar icons are available via the menus, with the exception of View Data which is also available as a hyperlink at the top of the Information Window.

Shortcut Keys

In the section which follows, the + symbol is used to mean pressing two keys at once; for example, Ctrl+End means "hold down the Ctrl key and press the End key".

Some functions do not require the mouse to find an option in the menu bar. *Shortcut keys* can provide a faster method of access.

The keys are listed below:

- **F1** – open the help file
- **F3** – close the current view and save changes
- **ESC** – close the current window without saving changes
- **CTRL+F** – find
- **CTRL+G** – find again
- **CTRL+C** – copy
- **CTRL+X** – cut
- **CTRL+V** – paste
- **CTRL+Y** – redo
- **CTRL+Q** – quit matchIT (from the main window)

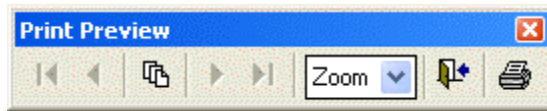
Additional Menu Options

matchIT displays various menus which depend on the particular activity that is taking place. Some of the options on these menus are not always available – those that are not available appear as "greyed out" (fainter).

The Toolbars



matchIT's Main toolbar



matchIT's Print Preview toolbar

The toolbars allow you to select the most common menu options with one mouse click. If any of the icons are greyed out, either they are not available in your version of matchIT, or the layout of the Main File that you are using does not support that option.

To see what each icon does, hold your mouse pointer over that icon until popup text appears.

Selecting a Destination of Printer gives more control over printing than the Printer icon in Print Preview.

Selecting Print from the icon in the Preview toolbar prints one copy of the whole report to the default printer. If you want to print the report to a printer other than the default printer, print more than one copy or a page range, you should select a Destination of Printer from the relevant reporting options screen, rather than print from the Print Preview toolbar.

Main File

Most of the options from the matchIT main menu require a Main File to be selected. The Main File is a DBF file that usually contains name and address records in a structure prescribed by matchIT. If a Main File is currently selected, its name and directory appear at the top of the Information Window. If a Main File is not currently selected, a message to that effect appears there instead.



Open Main File


If a Main File is selected but you want to select a different Main File, select the Open option from the File menu or the "Open File" button. If a Main File isn't selected and you select an option that requires one, the Open Main File option will automatically be presented.

You then see a list of files to choose from, in the directory from which you last selected a Main File.

If the file has fewer records than "Max database size to display stats on info screen" when you open the Main File matchIT will count the number of flagged records, salutations and postcodes are displayed when the pointer is moved over the file's hyperlink, for display at the top of the screen – otherwise it displays "n/a" for these items.

Copying Main Files and Layouts

Copy Main File

You can select this option from the Tools menu to copy an existing File, including the records within it. You may wish to do this to have both a backup and a working copy of a Main File you have just created. To enter a name for your new File, click on the  button to the right of the box that appears. After creating the new File, matchIT will open it as the Main File.

Copy Main File Layout



*Import
Records*

You can select this option from the Tools menu to clone the layout of an existing Main File. This option allows you to create a new Main File with the same layout as an existing one (but containing no data). If no Main File is open, matchIT will ask you to select a Main File layout to copy, then to enter the name for the new file.

Data can then be imported into this new Main File by choosing "Import Records" from the Import menu.

Closing Databases

matchIT automatically closes your currently selected Main File if any of the following are selected:

- "Close All" from the File menu
- "Open" from the File menu, unless selecting "Open Second File"
- "System Commands" or "Database Utilities" from the Tools menu

View Table

From several points in matchIT, you can view either your Main File (e.g. via the hyperlink button on the main screen) or other tables (from "View Table" under the View menu). This uses a Browse window.

Client_db			
	Addressee	Company	Address1
	JOSE ACEVEDO	NOBELES Q. SA DE CV	HANGAR C-11
	MR C STEINER	WURN MANUFACTURING INCORPORATED	POST OFFICE BOX 3567
	MIGUEL ROBOLLEDO	LOPATA S.A. DE C.V.	TERMINAL DE AVIACION GENERAL, HANGAR 6.
	MR E SIMMONS	WOOD AIR HOLDING CORP	2314 NORTHEAST 49TH DRIVE
	DR M GUNDESEN	WOODFORD UNIVERSITY	107 FOSTER HALL
	MR BRUCE AHRENS MMD	PACIFIC COAST TRUCKING ENTERPRISES	SUITE 2300
	GAIL FRANCAIT	KROHN-PLOUGH CORP	ONE LEDA FARMS
	MATT KASPAR	AVIATION SERVICES, UNLIMITED	14824 BOWE ROAD
	TODD FRIEDRICH	THIEL SHERIFFS DEPT	36430 BENSON AVE
	MR W DAYTON	PALMER AIR CHARTERS, INC	SUITE 106
	MR K SIPPLE	FEIDER COMPANIES INC	POST OFFICE BOX 56259
	TAMMY TASAN	ANDERSEN LAMB INC	2300 MARIE VICTORIN/05CAZ
	JACK GRIFFITHS	TIM HORTONS DONUT LTD	2600 SERAULT
	ROBERT DECOSTER	HOFFMANN'S CO	BOX 907
	LARRY WEYENBERG	MCMAHON FURNITURE	2237 COLBY AVENUE
		AIR MECH	PO BOX 37
	ROBERT HANSEN	STATEWEST AIRLINES INC	4909 EAST MCDOWELL ROAD
	JOAN MUELLER	AIRWEST HELICOPTERS, INCORPORATED	500 NORTH LINK LANE
	SIENNA CHARLES	EURO AIR	2316 BAYNERD BLVD
	CHARLES ZEMLOW	B100 CORPORATION	500 ROBERT JEMISON RD
	G UNDERHEIM JR	TBC	3155 WEST BIG BEAR RD.
	MR DANIEL MCCORMACK	THE KEFFER MANAGEMENT COMPANY	8200 EAST INDEPENDENCE BOULEVARD
	MR & MRS J CHRISTENSEN		205 BUTLER STREET, SE
		MERCANTILE BANK, N.A.	POST OFFICE BOX 524
	MR G SONATA	J.F.W. INDUSTRIES INC	POST OFFICE BOX 192610
	MR PHILLIP POKLASNY	THE BURKE GROUP	1200 AYR PARKWAY
	MR G ANDERSON	MOBIL OIL CANADA	1160-1124 AVIATION PARK
	CARRIE KONRAD	INTERGRAPH CORP	ONE MADISON INDUSTRIAL PARK

The browse window displays the records in the selected table.

The field containing the cursor will be highlighted, (ready for any cut, copy, or delete operation that you might want to perform) after clicking in the window. **Tab** takes you to the start of the next field, and **Shift+Tab** to the start of the previous field.

When you have finished viewing (and possibly editing) the table, **Esc** closes the window but does not save changes to the field you are currently positioned on. **F3** or closing the window with the mouse saves changes to the current field as well as the rest of the table.

When you are browsing a table, a Table menu appears at the right hand end of the menu bar. This menu allows a variety of options for data manipulation, positioning within the table and for controlling the view of the table.

As with other Windows database applications, you can re-size columns and drag columns within the view, to position columns in the order that you want to view them – this does not change the underlying database structure. Alternatively, if you click on the thick black rectangle in the bottom left hand corner of the window, the cursor changes to a "split" icon which allows you to split the window into two panes, so that you can view widely separated columns simultaneously without having to drag the whole of a column over.

If you see a record that has been flagged but has not been physically removed ("packed"), it will have a thick black rectangle at the extreme left hand end of the row.

Performance Data

This is a menu option available from the View menu.

All Runs

During Import, matchIT writes a record of the key information concerning Import, matching, deletion and Mailsort steps (including the Main File name) to PERFORM.DBF in the Database sub-directory. Selecting Performance Data, All Runs from the View menu allows you to view this table, with the most recent operation (i.e. "run") at the top.

Since Last Import

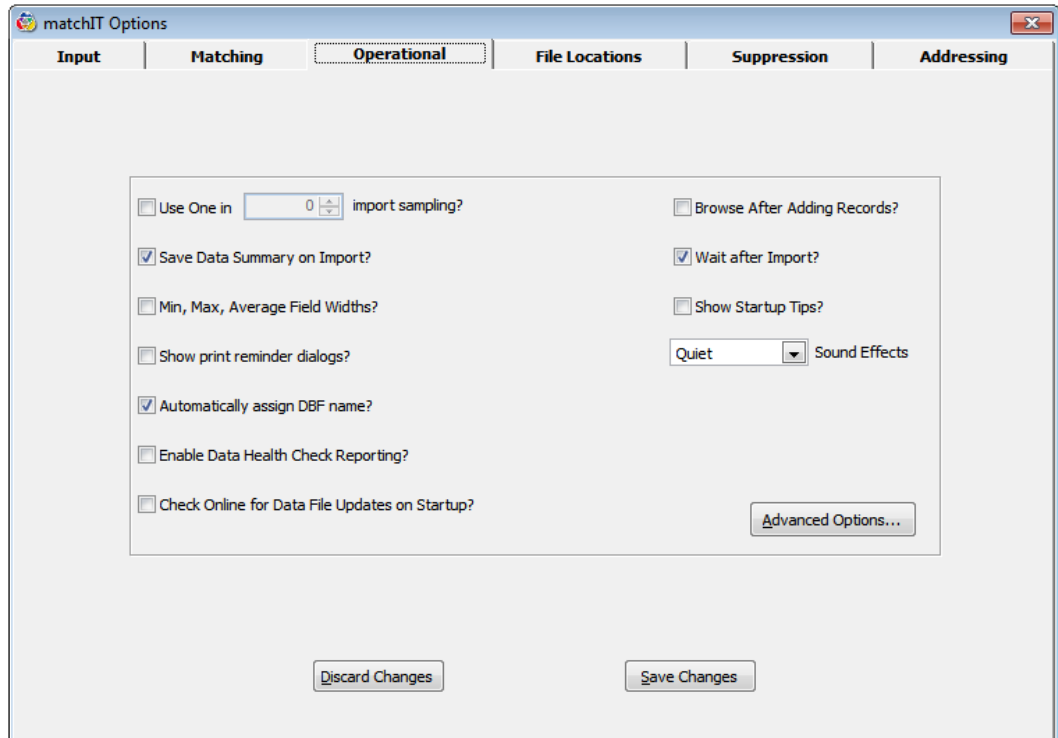
During these steps, matchIT also writes a copy of the progress information appearing in the Feedback Window to the PERFORM.TXT file in the same directory as the Main File. PERFORM.TXT can be viewed by selecting Performance Data > Since Last Import from the View menu. You must select a Main File first.

Setup Options

Introduction

matchIT's options have all been combined into one screen in version 6, which is accessible from the Jobs/Setup menu.

Operational Options



Use One in N import sampling?

Set this option ON to limit the import to an Nth sample of the input file. For example, set this option to 1000 to import only 1 in every 1000 records.

Print Structure?

Set this option ON to automatically display the Main File Layout report before Import. This report lists the different field names in the DBF file that you are importing into, as well as the widths and field types.

Prompt Checklist of Data?

Not available yet. Will be included in a future matchIT release.

Min, Max, Average Field Widths?

Set this option ON to automatically display the Main File Layout Field Widths report. This report lists everything that the Main File. Layout report does, but also displays the minimum, maximum and average field lengths within your records.

Show print reminder dialogs?

Set this option ON to prompt for printing reports after preview.

Automatically assign DBF name?

Set this option ON to automatically assign a name for the DBF file at the end of the Setup Wizard, in the same folder as the input file.

Browse After Adding Records?

Set this option ON to automatically view the contents of the Main File that your data has been imported into, before keys are generated.

Wait after Import?

If you tick the "Wait After Import" parameter check box matchIT will pause after Importing records so you can choose whether or not to proceed to Find Matches and if so which Match Keys to use. If you leave the box blank, matchIT carries on with matching automatically after Import, using default Match Keys. If the Main File has not been set up for matching, but has been set up for Mailsort, it will carry on automatically with the Do Mailsort processing.

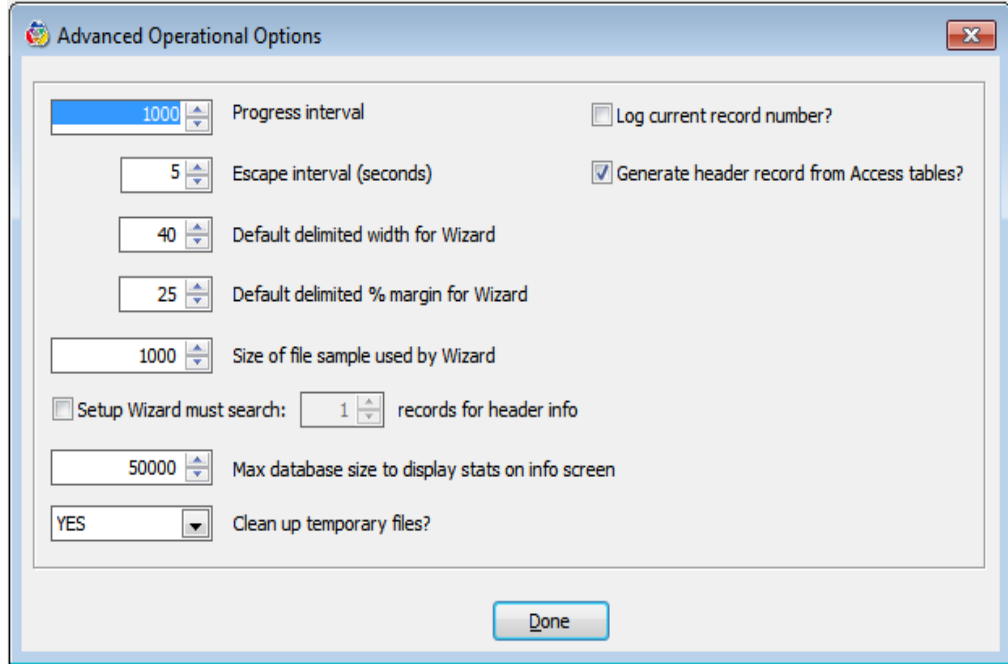
Show Startup Tips?

When you start matchIT for the first time, you will see a startup tips screen with several options, one of which governs whether or not that screen will be displayed next time. You can set this parameter "On" so that you will see this screen when starting up, or "Off" to disable it.

Sound Effects

If you set the Sound Effects parameter to 'Off', matchIT will not make any beeps when displaying error messages or when it has finished importing, matching and outputting records. If you set it to 'Quiet', it will make a single beep for all occasions.

Advanced Operational Options



Progress interval

The Progress Interval parameter is an integer. Its value specifies the number of records to process between updates of the progress information on the screen. At the end of each progress interval, updates are written from a temporary buffer to the hard disk for the table being processed. Too low a progress interval slows processing down.

Escape interval

To maximise the speed of the importation and deduplication, matchIT only checks for any keyboard input from the user (to see if they have pressed escape to abort the process) at a set interval. This parameter is the size of that interval, in seconds.

Default delimited width for Wizard

When importing a file using the Setup Wizard, matchIT has to determine the widths of each field into which the data will be placed. If the file has a delimited format (Comma or Tab delimited), then matchIT assigns each field a default width. This parameter governs that default value. The exception is when the Intelligent Setup Wizard determines that a field is a postcode or ZIP, or when it appears to be of a fixed width in the file sample.

Default delimited % margin for Wizard

matchIT scans a sample of your data and determines the max length for each column, it then factors in a percentage to increase it by, to accommodate for any larger pieces of data that may not have been included in the sample. It's very similar to a margin of error when determining how matchIT generates field widths.

Size of file sample used by Wizard

When importing a file using the Setup Wizard, matchIT shows you a sample of your file to enable you to identify the contents of each field. This parameter governs the size of this sample, the sample is taken from the beginning of a file.

Max database size to display stats on info screen

matchIT displays details about the currently selected Main File on the info screen, such as the number of flagged records, and the percentage of records which have postcodes. If the file has a large number of records, however, these details can take a long time to calculate, making it inconvenient when opening files. This parameter sets a record limit above which these details are not automatically calculated when opening a new file. This option cannot be set to lower than 100 records.

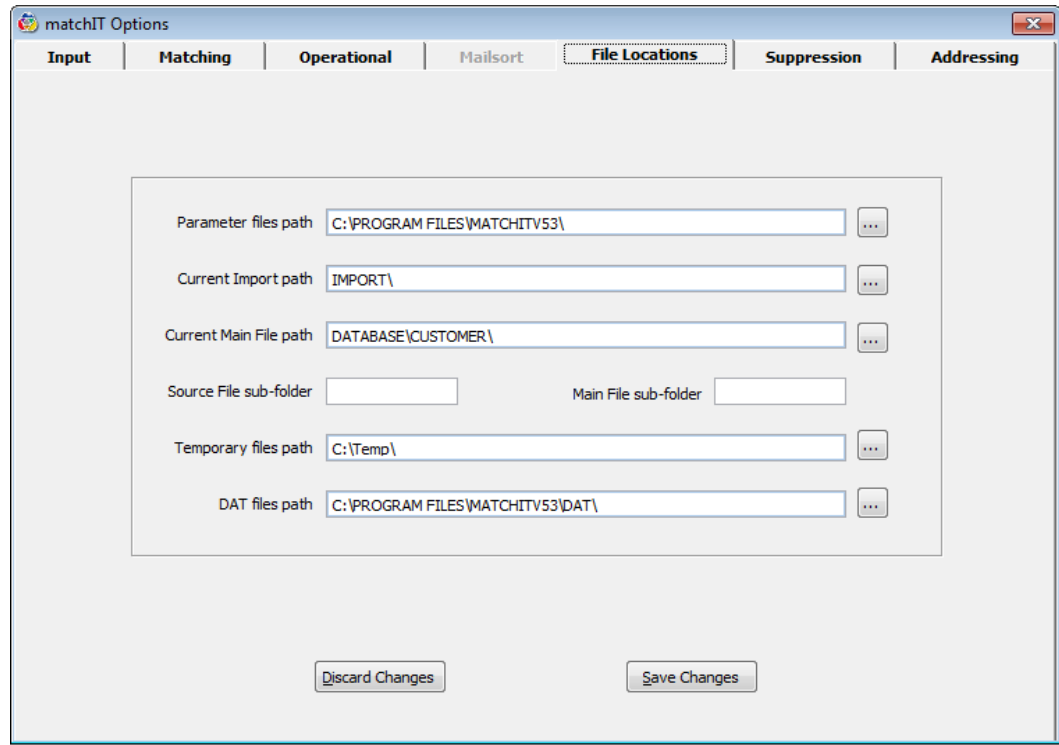
Clean up temporary files

This parameter governs what matchIT does with temporary files when it closes down. If this parameter is set to 'Yes' then matchIT will always delete temporary files and if it is set to 'No' matchIT will always leave the temporary files. Alternatively, if this option is set to 'Ask', matchIT will check with the user before deleting temporary files when closing down. What constitutes a temporary file is defined in the table CLEANUP.DBF in the main matchIT directory, which contains a list of file masks such as "*.TMP"; you can add other masks to this list. matchIT will delete all files matching these file masks in the matchIT directory and all its installed sub-directories.

Log current record number

If you tick this checkbox, then matchIT will record the record number (or pair of record numbers and match key for matching) it is currently processing when it is importing a file or doing Find Matches/Overlap. The information is recorded in a text file, which is called IMPORT.LOG for importing, MATCHING.LOG for matching on a single file, and OVERLAP.LOG for a find overlap on two files; all these files are found in the main matchIT directory. This is useful when there is a problem during one of these operations, as you can inspect this file to see which record (or pair of records) was potentially causing a problem.

File Locations Options



These options allow you to specify where matchIT should default to when looking for or creating various types of files.

Parameter files path

The Parameter Files Path from the matchIT Options, File Locations screen allows you to specify a directory for matchIT to look in for its parameter and matching results databases, instead of the default start directory and its sub directories. For example, if you want to use PARAMS and WEIGHTS for a job for the ABC client which are different from the XYZ client, you can create directories called ABC and XYZ, each with their own, different values. If you then set the Parameter Files Path to ABC, it will use these PARAMS and WEIGHTS, but if there is no PERFORM file in the ABC directory, it will use the one in the Database sub directory of matchIT.

Current Import path

The Current Import path from the matchIT Options, File Locations screen allows you to specify a different directory for matchIT to look in for a Source File to open. When you Import a Source File or open a Source File in the Setup Wizard, matchIT updates this path to the directory that you select the new Source File from.

Current Main File path

The Current Main File path from the matchIT Options, File Locations screen allows you to specify a different directory for matchIT to look in for a Main File to open. When you open a Main File from the menu or toolbar, or save a new Main File layout in the Setup Wizard, matchIT updates this path to the directory that you select the Main File from.

Source File sub-folder

The Source File sub-folder from the matchIT Options, File Locations screen allows you to specify a sub-folder of a "job folder" that you use for the data that you run matchIT on. For example, if you use a standard name for a job folder of JOB12345 with a standard sub-folder name for source files of SOURCE, enter the name SOURCE in this option.

Main File sub-folder

When you save a new Main File layout in the Setup Wizard, matchIT will default to save the file in a sub-folder of this name, either within the directory that you select the Source File from, or within the directory above that if the Source File is in a sub-folder matching the name in the Source File sub-folder described above. For example, if you use a standard name for a job folder of JOB12345 with a standard sub-folder name for matchIT files of WORK, enter the name WORK in this option.

Temporary files path

The Temporary Files path from the matchIT Options, File Locations screen allows you to specify the directory that matchIT uses to store temporary files. You can specify this path when you install matchIT, but change it at any time using this option – you must restart matchIT for it to take effect. You should select a directory on a local hard disk – if you have more than one local hard disk, we recommend that you store temporary files on a different physical hard disk from that on which matchIT is installed. matchIT creates a lot of temporary files, which are usually cleaned up when you close matchIT, but if it crashes, they will not be deleted.

DAT files path

This option specifies where the primary matchIT data files are located. This includes, but is not limited to, the following types of information.

- Single word lookup (Names & Words table)
- Two word lookup (Names & Words table)
- Business Noise Words (Names & Words table)
- Mailsort data
- etc.

Other Options

The other parameter screens are described in their relevant sections:

- ["Input Options"](#)
- ["Other Mailsort Options"](#)
- ["Matching Setup"](#)
- ["Addressing and Postcoding Options"](#)

Multiple Parameter Sets

Save/Restore Setup

If at any time you want to revert to a standard configuration for the Matching Weights, Matching Matrices, or Option settings, you can do this from the Save/Restore Setup option from the Jobs/Setup menu. You can choose to individually restore any combination of the aforementioned settings by setting the check boxes on this screen. There are six types of matching for which relevant settings can be restored: Individual, Business, Household, Family, Company only, and Custom. Use the drop-down boxes labelled "for ... configuration" and "for ... nationality" to set the level of matching and the nationality of data. Finally, click on the 'Restore setup' button to restore the chosen settings.

If you are changing the nationality of data that you are processing, restore standard parameters for that nationality **before** you go into the Setup Wizard. If you are processing mixed country non-UK data, select **Worldwide** nationality. If you are processing both UK and non-UK data, select **Mixed incl. UK** nationality. If you are processing data all for one country, select that country if it is available in the list, otherwise select **Worldwide**.

Save User Parameters

If you want to save any of the settings that you have specifically set e.g. because they work well on a certain type of data, you can also do this from the Save/Restore Setup option from the Jobs/Setup menu. Set the check boxes according to which type of setting you want to save, then set the drop-down box under the check boxes to say "Custom"; the 'Create/update setup' button will then become enabled. The custom parameter set is indicated by a file extension, so type a file extension (which can be more than three characters) in the text box labelled "with File Extension".

Certain file extensions are reserved for the five standard matching setups; these are "IND", for personal matching, "BIZ", for business matching, "HH", for household matching, and "FAM", for family matching, "CO", for company only matching.

Restore User Parameters

To restore a set of previously saved user parameters, choose the Save/Restore Setup option from the Jobs/Setup menu, and set the drop-down box under the set of check boxes to say "Custom". Then type in the relevant file extension in the text box labelled "File Extension", click on the 'Restore setup' button and the chosen settings will be restored. If you created that parameter set for a different nationality, you must restore the standard parameters for that nationality before you restore the custom set.

Data Archival of Jobs

The 'Data Archival of Jobs' functionality is designed to archive all customisable files and parameters within a matchIT installation, to a location chosen by the user. These files can then be restored at a later point, in order to revert back to the exact matchIT environment, as it was at the time when the files were archived.

Upon restoring from an archive, the user will in theory be able to repeat a job that was carried out in matchIT directly before the archive was created, and get exactly the same results.

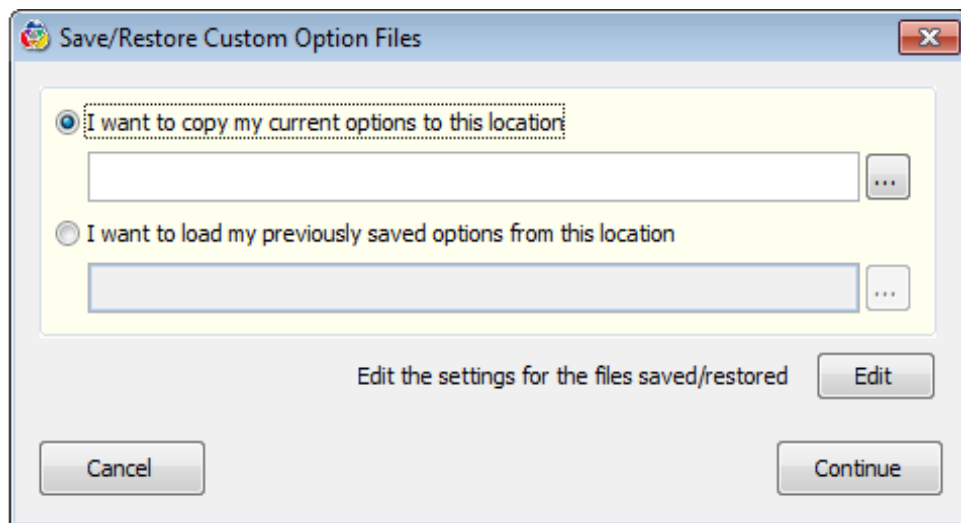
An archive might also be created, in order to save files that are specific to a company's data processing standards. For example, the users company may always need to have certain exclusion words included in the Names and Words table or use company specific report branding. Therefore, an archive can be created on a shared drive, and each time a user installs matchIT, they can restore from the shared archive before they begin using the new installation.

The files that are saved/restored by the data archival functionality can be customised by the user.

Creating an Archive

Before creating a new archive, the folder in which the archive is to be created must already exist.

To create a new archive of files, select 'Save/Restore Setup' from matchIT's Job/Setup menu. The 'Save/Restore Setup' dialog will appear. After selecting the "Advanced" button the dialog below will be displayed.




Make sure that the 'I want to copy my current options to this location' radio button is selected, and click on the corresponding . A 'Select Directory' dialog will now appear. From here, navigate to the folder in which the archive is to be created, select that folder, and then click on the 'Select' button.

The 'Save/Restore Custom Option Files' dialog will now be displayed again, but with the archive folder selected. To create the archive, click on 'Continue'.

While creating the archive, matchIT will display information in the main Feedback window on which files are being archiving and the general progress. The overall process should not take more than a few seconds.

Restoring from an Archive

To restore from an archive, navigate to the 'Save/Restore Custom Option Files' dialog, but this time select the 'I want to load my previously saved options from this location' dialog. Click on the corresponding , and this time select the folder containing a previously created archive. Upon being returned to the 'Save/Restore Custom Option Files' dialog, click on continue to begin the restore process.

Before the restore process starts, a prompt will appear asking for confirmation to proceed with overwriting the matchIT work file that was in use at the time of taking the archive, with an empty structure of that file. Choose 'OK' to proceed or 'Cancel' to prevent this file being overwritten.

Similar to creating an archive, the feedback window will display information on what is being restored, and general progress of the restore. The restore process should not take more than a few seconds to complete.

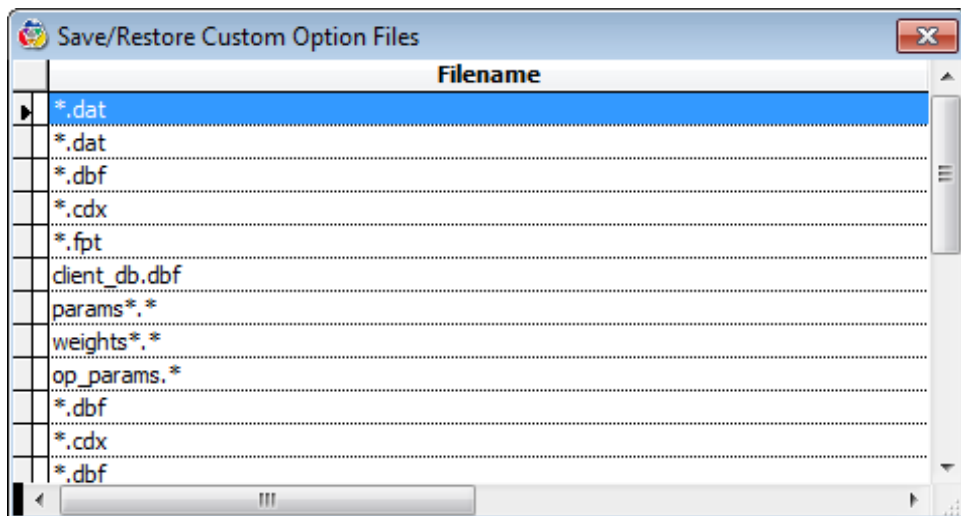
Editing the Files that are Saved/Restored

To edit the files that matchIT Saves/Restores, click on the 'Edit' button from within the 'Save/Restore Custom Option Files' dialog. A table (Restorelist.dbf) will be displayed. Each row in this table represents a different combination of folder to save from/files to save/folder to archive those files to.

The names of the folders to archive from/to are stored within the 'Location' field. The files within that folder that are to be backed up are specified in the 'Filename' field, and the folder in which they are to be archived to is specified in the 'Storeloc' field.

Wildcards can be used to specify more than one file, files with the same name but different extensions, or file with different names but the same extension. By default, the first record in the table represents matchIT's 'DAT' folder. In this, the 'Location' field contains '...\DAT'. The 'Storeloc' field contains 'DAT files' and the 'Filename' field contains '*.dat'. Therefore, by default, all '.dat' files from matchIT's 'DAT' folder will be restored to a new folder called 'DAT files' in the archive folder specified by the user. All '.dat' files in this folder will be restored back to matchIT's 'DAT' folder during the 'Restore' process.

To remove any records from this table, click on the small deletion cell. To indicate that a record has been deleted, this cell will turn back. The image below demonstrates how it would look if the second and fifth records were deleted.



To add a new record, select 'Append New Record' from the 'Table' menu, whilst browsing this table.

Running Backup or Restore from a Job Script

Files can also be archived or restored from within a job script by mapping the program "backup_or_restore.prg" from the script. This program is supplied with matchIT and can be found in matchIT's Progs sub-folder.

The program will need to be mapped from a 'Source File' cell whilst browsing the script in the Editor screen. After mapping the program, the first two lines of active code will need to be edited by double-clicking on the corresponding Source File cell and selecting 'Edit Source File'. These lines determine whether to run the 'Archive' process or the 'Backup' process, and where to archive to or backup from. The lines are as follows:

```
ProcedureToUse = "BACKUP"
```

```
BackupOrRestoreDirectory = "FULL PATH OF BACKUP DIRECTORY"
```

The italic text above is the code that will need editing.

After mapping the program from a job script and editing the program accordingly, the script can be run. The same feedback will indicate the success of this process.

Note: job script tables (Job and Job_Set files) cannot be archived or restored whilst calling this process from a job script.

Troubleshooting

- Feedback indicates that files could not be copied, during the 'Save' process:

If any changes have been made to Restorelist.dbf, make sure that the changes point to valid files.

Make sure that none of the files that Restorelist.dbf has mapped are opened or locked by any other applications or users.

Make sure that the location in which the backup is being created can be written to, and that none of the sub-folders or files that matchIT may be trying to overwrite are opened or locked by any other applications or users.

- Feedback indicates that files could not be restored, during the 'Restore' process.

If any changes have been made to Restorelist.dbf since the backup was created, make sure that the changes point to valid files.

Make sure that the backup folder and its sub-folders that the backup was originally created in are still valid and have not been renamed, moved or deleted.

If the backup folder is on a network, make sure that the location can be accessed freely and that the connection is OK. If in doubt, try copying files from that location manually.

Setup Wizard

Launching the Wizard

You can start any of the Setup Wizard's from matchIT's Wizard Pane, or you can access the Setup Wizard from the Import menu. The Getting Started Guide provides a step by step example for using the Setup Wizard.

Importing Data

Assuming that you have a file of names and addresses, you need to specify its Input Format and the Field Layout. If the file is on CD or some other removable media, it may be best to copy it to your hard disk first, making it ready for input.

The Setup Wizard provides the simplest method of importing data into matchIT, from a variety of file types. The Wizard will read DBF, Access, Excel and ASCII text files, as well as an ODBC Connection file. Text files can be one of four types: comma delimited (commonly known as CSV), tab delimited, fixed width or fixed width without Carriage Return Line Feed (CRLF) characters – for this last type, you must specify the record length.

The use of the Setup Wizard is described in the Getting Started Guide, which is available as a separate booklet or in PDF format from the matchIT Help menu.

*Effective
Quality
Assurance is
necessary to
detect any
problems with
less common
or
inconsistent
input formats.*

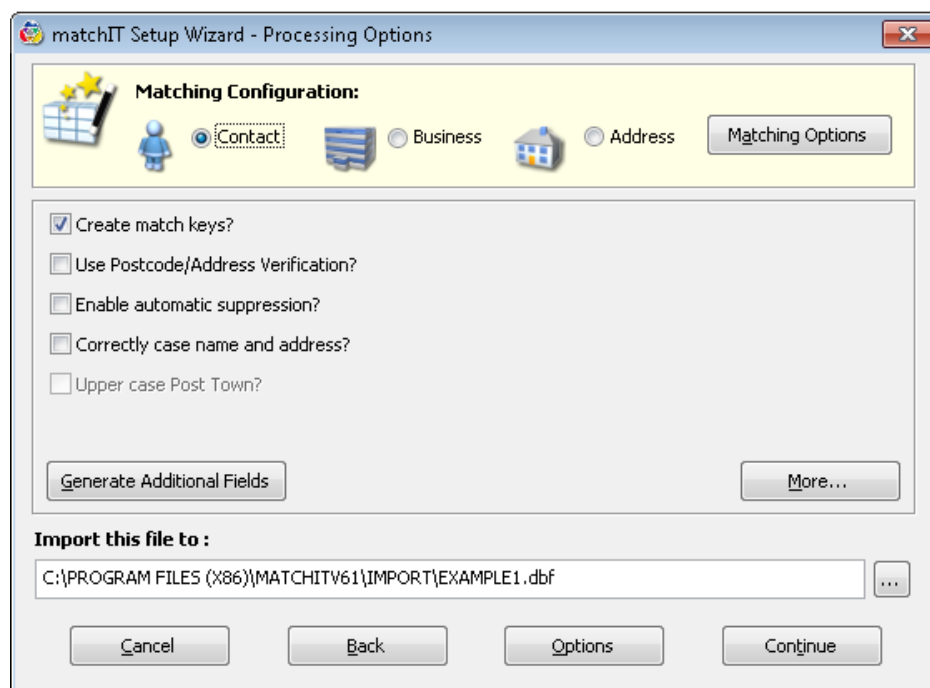
If files are inconsistent in their input format, they will not be imported properly. Please note that the Intelligent Setup Wizard only examines and displays the first few records in a file when trying to determine the type of data and its width – make sure that (for delimited files) fields are not being truncated. It is best to err on the side of caution by allowing too much width. You can check or change maximum field widths after Import by using the Database Utilities option [Change Fields to Fit](#).

Before Import

Enable Automatic Suppression

"Enable Automatic Suppression" can be checked to verify and remove Suppression records (available only with **suppressIT**).

After clicking "continue", the next screen in the Setup Wizard asks what needs to be done with the data next. The exact options available will depend upon the version of matchIT being used and the type of data imported.



- "Create Match Keys" must be checked to find duplicates within a file, or find matching records in another file e.g. if this file is a suppression or "stop" file. (available only with **matchIT Lite/Plus/Pro**)
- "Use Postcode/Address Verification" can be checked to verify and correct UK postcodes and addresses (available only with **addressIT**).
- "Enable Automatic Suppression" can be checked to verify and remove Suppression records (available only with **suppressIT**).
- "Create Salutations " must be checked to derive Salutations (e.g. Dear Mr Brown) - these can only be derived if Match Keys are created. The Default Salutation (see [Default Salutation](#)) is used if matchIT cannot work out the correct salutation. You can change the default using the Options button.
- "Correctly case name and address" (available only in matchIT **Pro** or with the **Salutations and Casing** module) should be checked if:

- the data is all upper case
- the casing is poor or inconsistent
- you want to upper case the Town field (by default, this handles UK towns only).
- Matching records can be found to:
 - Individual, Family or Household (Address) level for personal data
 - Contact, Business or Address level for business data
- You must select the matching level by using the buttons at the top of the window.
- The More.../Basic... button toggles between advanced import options and basic import options.

What happens after the Setup Wizard is determined by the options set and then which action button is selected.

Import Only

Select this to create a Main File and import the input data file into it, without finding matches.

Use this if:

- you want to change any of the matching rules before Find Matches
- this is a suppression file which you want to compare against another file but don't want to Find Matches within.

Find Matches

Select this to create a Main File, import the data and then find matching records using default matching rules. Don't select this option if you are setting up this Main File to use in the Multiple File Wizard later, because the Multiple File Wizard performs the matching.

Save and Exit

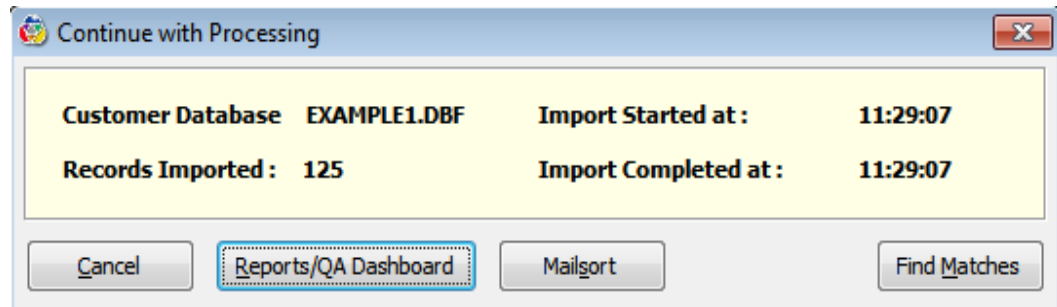
Select this to create a Main File layout with the required fields (including matchIT's fields chosen through the checkboxes), but empty of records. Use this if you want to change any Input or Operational options before importing the file, or if you are setting up Main File layouts to use in the [Multiple File Wizard](#) and want to leave the time-consuming process of Import until later.

Cancel

Select this to quit the Setup Wizard and lose the information entered about the file setup.

End of Import

Once the data has been imported, matchIT displays a dialog to allow you to choose from several options:



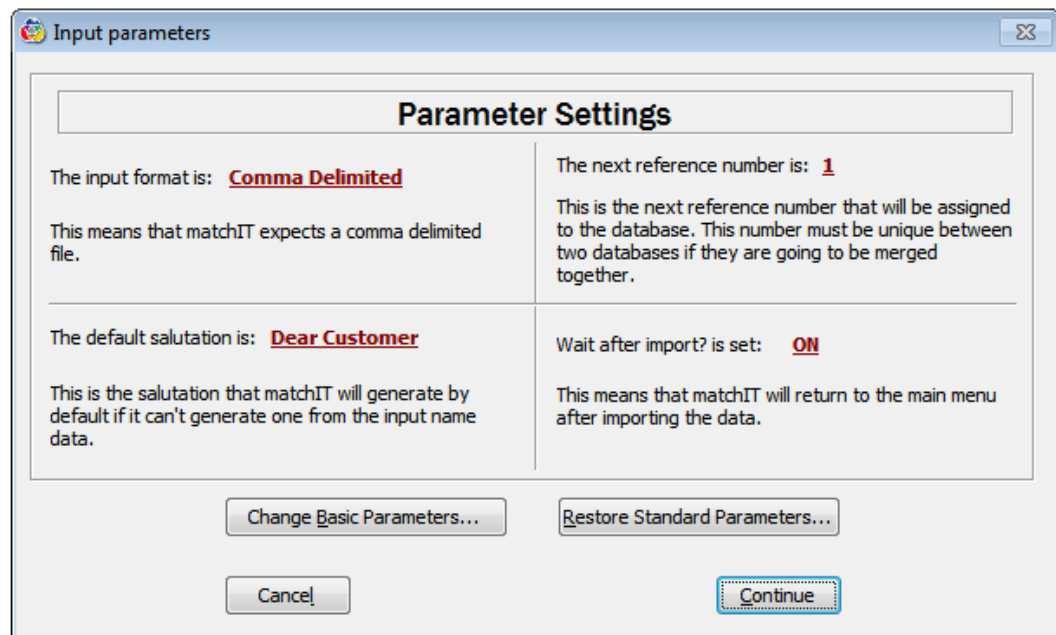
- "Q/A Wizard" to view the imported records, data summaries, records by categories, and rejected records.
- "Find Matches" to display the Matching Key and Range screen.
- "Mailsort" to Mailsort the data – this step checks the data for undersized direct selections, see [Mailsort](#) for more info.
- "Cancel" to return to the main menu.

Importing Data

Importing without using the Setup Wizard

If the file is in the same input format and field layout as a file that you have previously loaded into matchIT, you don't have to go through the Setup Wizard again. The field layout is stored in the Main File that you used previously and the Input Options specify the Input Format and what processing you want to do on Import.

To import a file into matchIT without using the Setup Wizard, select Import Records from the Import menu. Firstly, select the Main File that you used previously, or create a copy of this file's layout by using the [copy main file layout](#) option. matchIT then prompts you to change the Input Options if necessary (via the Change Basic Parameters button) e.g. if the last file you Imported was Comma Delimited but this file is Fixed Width:



If you want to dedupe the file at a different matching level than the last file you deduped e.g. individual last time but family level this time, select Restore Standard Parameters and select the appropriate matching level. This restores not only the matching level (in Matching Options) but also the matching weights (and the settings for a different nationality).

Next, select the input file (the source file) that you want to load into matchIT.

If there are records in the Main File from a previous run, matchIT wipes the file clean (also known as "zapping" it) before it loads in the new data.

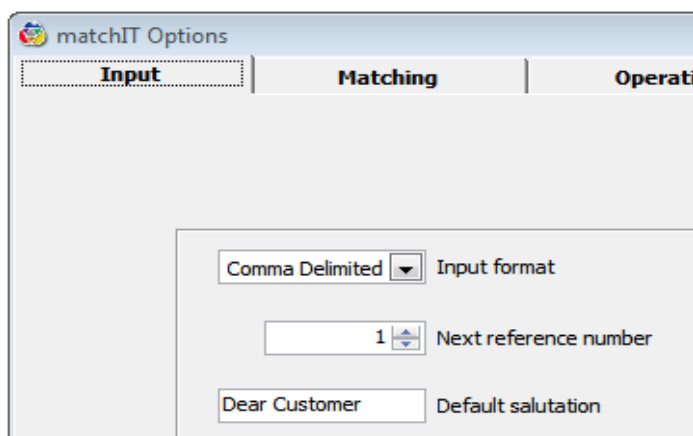
Contacts and Salutations

This section is only applicable if you have matchIT **Pro**, or the Salutations & Casing module.

matchIT **Pro** has the facility to generate contacts (Prefix Initials Surname e.g. Mr J R Smith) and salutations (e.g. Dear Mr Smith) for every record in a Main File. To derive salutations, check the "Create Salutations?" box at the end of the [Setup Wizard](#).

If your data is originally in "prefix, forename, surname" format, matchIT will use these fields to generate the contact. Otherwise it will look for a prefix in the "addressee" field or use the forename to assign Mr or Ms if there is no prefix present – it can only do this when the forename is in matchIT's Names and Words table as male or female. Prefixes are also defined by entries in matchIT's Names and Words table, along with the appropriate salutation rules.

A default salutation is used when matchIT cannot work out an appropriate one from the customer's name. This default can be changed via the [Default Salutation](#) option under the Jobs/Setup menu, Options, Input tab.



Names and Words

The Name and Words facility (from the Jobs/Setup menu) is used for changing or adding entries to the NAMES lookup table. You can choose to add an entry, remove an existing one, or search the table for a particular entry. For adding an entry, there is another screen where the word to add can be entered, along with the matching equivalent (which matchIT uses when matching), the type (chosen from a drop-down list), the sex and salutation (if appropriate), and the proper case value (which matchIT will use when casing).

When searching for an existing word, there are two choices; 'Search' and 'Search Rest'. 'Search' will find the first occurrence of the entered word, while 'Search Rest' finds the next occurrence from the current position in the table, this enables multiple entries to be found. The word can be searched for as a specific type, or as any type.

The NAMES lookup table is actually held in a fixed-width text file in the DAT sub-directory; the layout of this file is as follows:

Heading	Width	Description
TYPE	1	Type of entry – see below
EQUIVALENT	25	Matching equivalent of the entry (e.g. 'Tony' has a matching equivalent of 'Anthony', enabling these two names to be matched)
NAME	10	The word which is actually looked up
SEX	1	Indicates the sex of the forename or prefix
SALUTATION	2	Indicates the type of salutation to be generated for a particular prefix
PROPER CASE	30	Proper case value for the entry
SWITCH	1	Indicates whether this entry is the first part of a double word phrase

The different "Types" that can be entered in the table are as follows:

Type	Description
'A'	Address Word, such as "Rd" or "Street"
'B'	Business word, such as "Ltd" or "Printers"
'C'	UK county, such as "Kent" or "Glos"
'E'	Exclusion word, such as "Deceased" or "Moved"
'F'	Female forename (note the sex has to be set for these entries too)
'J'	Job title word, such as "Manager"
'M'	Male forename (note the sex has to be set for these entries too)
'N'	Noise word (i.e. ignored when generating keys or address matching), such as "The" or "House"
'O'	Overseas i.e. foreign country
'L'	Local country, such as "UK" or "Scotland"; this enables local countries to be identified as countries, without the record being marked as foreign
'P'	Prefix, such as "Mr" or "Captain" (note the

	sex has to be set for these entries too, also the SALUTATION TYPE)
'Q'	Qualification word, such as "PhD" or "ARICS"; these entries typically always need a proper case entry as casing of qualifications can be unusual
'S'	Special casing word, i.e. a word that is cased unusually but doesn't fall into any of the above categories, such as "PhotoMe"
'T'	State or province, such as "Pennsylvania" or "PA"
'U'	Unknown word; this is for the first words of a two word phrase, which, on their own, have no special meaning, such as the "Hong" in "Hong Kong"

Each prefix entry must have a salutation type associated with it. The following list shows the salutation types, along with an example of the type of salutation that will be generated:

Type	Rule	Example
S	Dear Prefix Surname	Dear Mr Smith
C	Dear Prefix Surname	Dear Mr Smith
FS	Dear Prefix Forename Surname	Dear Mr John Smith
FF	Dear Forename	Dear John
F	Dear Prefix Forename	Dear Sir John
B	Dear Prefix	Dear Sir
T	Prefix	My Lord

In addition to these, the following salutation types will affect the way in which matchIT will generate a contact as well as a salutation.

Type	Salutation Rule	Example
SZ (Suffix)	Dear (def) Prefix Surname	Dear Mr Smith
ZZ (Suffix)	Dear (def) Prefix Surname	Dear Mr Smith
TA	Prefix	Your Eminence

BA	Dear Prefix	Dear Madam
SA	Dear Prefix Surname	Dear Family Smith

*'SA' is the same as type 'S', but if a full forename is found, the full forename is ALWAYS included in the generated contact, regardless of whether or not the ['Use full name in contact?'](#) option is ticked.

Type	Contact Rule	Example
SZ	(def) Prefix Forename Surnames Suffix	Mr John Smith Jr
ZZ	(def) Prefix Forename Surname	Mr John Smith
TA	Prefix Forename Surname	Your Eminence John Smith
BA	(EQUIV) Forename Surname	Countess Jane Smith
SA	Prefix Forename Surname	Family John Smith

Additionally, each prefix, male forename and female forename must have a sex associated with it, taking a value of either 'M' (Male), 'F' (Female), or 'E' (Either).

The 2 GB File Size Limit

The 2GB limit is essentially a by product of DOS and subsequently the Windows File Systems, these were limited to 2GB at a time when the largest hard disk purchasable was approximately 180MB. This problem is not limited to FoxPro – Microsoft Access and Sequel Server's MSDE product amongst others have a 2GB limit.

What does the 2GB limit mean in terms of matchIT? 2GB is 2,147,483,648 bytes. To work out how many records this represents, find out how many bytes per record are in the file. The Table tab in the Main File Layout Table Designer will show the total record length of each record and enable calculation of the maximum number of records that can be loaded into one table. The formula is $1024 * 1024 * 1024 * 2$ divided by the record length.

To access the tab table, open a DBF file, click tools, then main file layout table designer and finally click the table tab

Steps to take to ensure the 2 GB limit is not reached:

- 1) Maximize the number of records able to be imported by reducing record lengths i.e. reduce the size of the input fields as much as possible (name and address fields can often be limited to 20 or 30 characters) and remove any fields not needed for matchIT to process prior to import.
- 2) Reduce or remove some of matchIT's generated fields as follows:
 - Name - make this 1 byte if you aren't doing Individual level matching
 - Coy_name - delete if you aren't doing Business level matching

- Name_key - delete this: it is just NAME1 + LEFT(NAME2, 1) if you want to use it in a match key
- Coy_key - delete unless you are doing both Business and Individual matching
- Match_ref - delete unless you are exporting matching info to another system
- Overlap_ref - delete unless you are exporting matching info to another system
- Set_dups - delete unless you need to count duplicate group sizes
- Premise - keep it short, 3-6 bytes depending on your data
- Salutation, Contact - delete and generate later, either on a split file or one with fields that were required for matching limited to one byte.

3) If using addressIT, reduce record lengths by not storing the input address by allowing addressIT to overwrite the input address fields. Do this only if addressIT's feature to compare changed addresses is not needed

There are other fields that matchIT usually adds that can be eliminated – please contact our support team for advice.

If the file still exceeds 2GB, consider the following alternatives:

- If it is the master file in a multiple file job which exceeds 2 GB, large suppression files can be kept out of the multiple file wizard and then used in Find Overlap - this is much more efficient too.
- If using suppressIT, it is easier to keep the suppression files separate than by using Find Overlap. In addition getting the suppression files included in the multiple file reports with suppressIT.
- If it is not a multiple file job or has no large suppression files, split the file on e.g. first character of postal code. If many records contain no postal code, dedupe each file individually and then find overlap between them. If the postal code is populated consistently and reliably, then finding the overlap is unnecessary.

Import Records

matchIT first reads the records from the input file into the selected Main File. If they are already in a matchIT standard DBF file (see "[Main File Layout](#)"), then you can select Generate Keys from the Import menu instead of Import. Both options perform processing as follows (assuming that the relevant fields are defined in the Main File Layout and that you have the appropriate modules of matchIT Desktop):

- generate salutations and phonetic keys from the various name fields
- splits freeform personal names into component parts or combines them
- generate phonetic or non-phonetic address keys
- generate Mailsort codes

The processing described above is implicitly specified by field names in the Main File Layout – the Setup Wizard adds the fields when it creates the file, depending on the options chosen. The processing described below is controlled by the Options chosen at the end of the Setup Wizard or on the Options screen (in the Jobs/Setup menu):

- correct and validate postcodes and (if requested) addresses
- convert names, address lines and (if present) job titles to "proper case"

- relocate data items to appropriate fields – this can include postcodes, company names and job titles.

Information about the progress of these operations appears according to the Progress Interval specified – select the [Operational Tab](#) from the Options screen, Job/Setup menu, to modify the Progress Interval. After every Progress Interval, the display is updated. If the Main File has more records than "Max database size to display stats on info screen", a Browse view of the data being processed is displayed on the right hand side of the screen. The top half of this display shows fields from the input data, in the input order. The bottom half shows matchIT's generated fields, in an order specified by a parameter file (IMPORTFIELDS.DBF).

You can pause at any stage by pressing the Escape key i.e. if you want to devote processing power to another task for a while, or if you want to change the Progress Interval or abort the Import. after changing or leaving the progress interval, press Esc or F3 and then select 'Yes' to abort processing or 'No' to continue.

If you abort and later want to continue from where you left off, select the Generate Keys option from the Import menu. You will be prompted with the record number that follows the last record to be fully processed before the interruption. Check "Start at beginning" to generate keys from the beginning of the file; otherwise, confirm the number of the last record for which keys have been generated, or enter a different value.

During Import, matchIT writes a copy of the progress information appearing in the Feedback Window to the PERFORM.TXT file in the same directory as the Main File. See "[Performance Data](#)" for more details.

After carrying out these operations, if the Wait for User after Import option is ON, matchIT will ask if you want to use the Q/A Wizard View (to View Data or View the Data Summary), Find Matches or (if you have generated Mailsort codes but not Match Keys) Mailsort.

If the "Wait for User after Import" option is not checked, after Import has finished matchIT will automatically Find Matches using the default Match Keys or (if you have generated Mailsort codes but not Match Keys) Mailsort.

The [Data Summary](#) will provide information on the newly imported data.

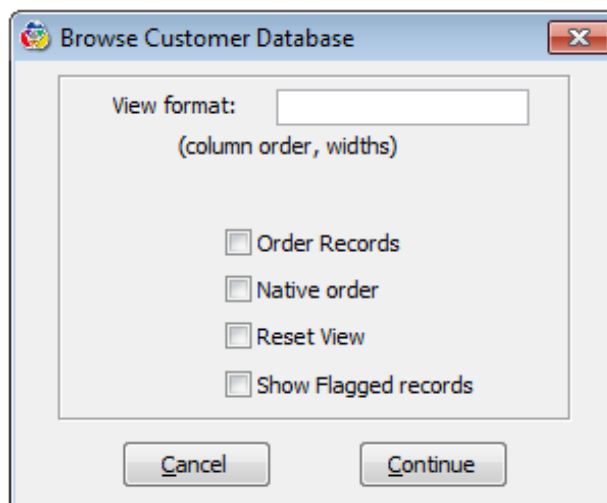
Data Summary

This is an option under the matchIT Import menu or via the Quality Assurance option under the Output menu – from here, you can choose to preview the report, print it or output it to a file. This option is described in more depth under [Quality Assurance Introduction](#).

View Data

This option is available as a hyperlink at the top of matchIT's main window, or within the **View** menu as **View Data in Main File**. View Data allows you to browse and update the selected Main File in any order. It is similar to the View menu, **View Table** option, except that you don't have to specify the table to browse and you can browse the Main File in order of any field within it.

First, an options screen will be presented:



- Select the **View Format** you want to use, or enter the name of a new format under which to save the view that you create next. You can manipulate the display as normal.
- **Order Records** allows you to choose a field to order the records on (select a field from the list presented next). Each time you select to browse in order of a field for which an index was **not** created at the end of Import (which usually includes the default Match Keys and UNIQUE_REF), matchIT will create an index – this will take quite some time on a large file.
- **Native View** means the fields will be displayed in the order they are in the Main File – the browse view may have been previously changed by changing the files sort order or column order.
- **Reset View** means the column order and width will be reset in the browse view. – the browse view may have been previously changed by changing column order and widths.
- **Show Flagged records** will include records that were flagged from the Main File (usually by Flag Matches) in the browse view. These will have a black marker in the leftmost column.

Main File Layout

Summary

The best way to configure a Main File with all the fields required for processing your data file is to use the [Setup Wizard](#). If, for some reason this is not possible or not an appropriate option, this section explains the fields your Main File must have so that matchIT can do what is required.

There are basically two kinds of fields that the system uses. First, there are **Input Fields**. These are the fields that you, the user, will supply for matchIT's processing. If they are name and address fields, you must give them standard matchIT field names, because otherwise matchIT will not recognise that it must apply appropriate processing to these fields. For example, it must know if a field is a freeform field containing a person's name, or if it contains just the surname, or if it is an address line etc. Although matchIT can search through name fields for job titles, through address lines for names or postcodes etc., it will work much more effectively if you can label your data with appropriate matchIT standard field names.

Additionally, matchIT uses **Generated Fields**. These are fields that probably weren't in your input data, but matchIT will generate them from your data. They are critical to the main processing steps (deduplication, Mailsort etc). It is normal to have the input fields at the start of your Main File layout, in one block, and to have the generated fields in another block at the end of the layout. We recommend that you keep to this unless you have a special reason not to, as this allows matchIT to work out which fields are Input Fields and which are Generated.

However, as shown in [matchIT Field Names and Usage](#), some fields can be Input in one file but Generated in another. Also, some Input fields can be replaced by Generated fields.

matchIT Field Names and Usage

The table in [Appendix A - Field Names & Usage](#) lists field names and usage in alphabetical order.

Quality Assurance Field

matchIT requires a FLAG field to prepare the [Data Summary](#) and for [View Records by Category](#) to allow you to examine certain categories of a record. Entries in the Flag field are explained in Appendix B.

matchIT Field names by Type

These are the main data fields that matchIT recognises specifically for import, matching or Mailsort processing:

Personal Name

- ADDRESSEE, CONTACT, FORENAMES, FORENAMES2, INITIALS, INITIALS2, NAME, NAME1, NAME2, NAME3, NAME2FOUND, NAME_KEY, PREFIX, PREFIX2, QUAL, SALUTATION, SEX, SUFFIX, SURNAME, SURNAME2

Company Name

- COMPANY, COY_KEY, COY_NAME, NAME1, NAME2, NAME3

Job

- DEPARTMENT, JOB_TITLE

Address

- ADDRESS1 to 9, ADD_KEY, COUNTY, COUNTRY, DPS, POSTCODE, POST_IN, POST_OUT, PREMISE, STATE, TOWN, ZIP

Telephone

- FAX, REST_PHONE, STD_CODE, TELEPHONE

Campaign

- MAILING_ID, MAIL_DATE

Mailsort

- BAR_CODE, CHECKSUM, MS_SELCODE, STARTOFBAG

Match Set Grouping

- MATCH_REF, SET_DUPS, OVERLAPREF, OVERLAPCNT, MATCHSCORE

Deletion Priority

- DEL_PRI

Quality Assurance

- FLAG

Unique Reference

- UNIQUE_REF

Using Your Own Field Names

You may use your own field names within matchIT. If you do, matchIT will not recognise them for special processing (e.g. if you name a field as CUSTOMER instead of ADDRESSEE, matchIT will not apply its personal name processing to that field). This is because matchIT uses the field name as the main indicator to tell it what kind of data is likely to be in that field.

Although matchIT won't apply any special processing to your own field names, it will apply its standard string handling routines. This means that you can use any field you like as either a matching key or for matching weights. We don't recommend doing this until you are confident that you completely understand how matchIT works, as using a non standard field can have a drastic effect on your matching results.

To allow you to use your own field names safely, we have set down a few guidelines on what to call your fields. If you follow these rules, you should have no problems using your own fields in matchIT:

- Each field name in a Main File should be unique. If you have fields that do a similar thing, number them – for example, "CUSTOMER1", "CUSTOMER2" etc.
- Whenever possible, select the field name "OTHER" from the suggested list in the Setup Wizard for fields that you know matchIT won't need to know about. We appreciate that in many situations, these names would not be sufficiently meaningful for processing, so in these cases, follow the naming rules below.
- Field names must not be greater than 10 (ten) characters long
- Field names must ONLY contain the letters A-Z or the numbers 0-9, or the underscore character ("_"). Field names must NOT contain spaces or any other kind of punctuation.

- Field names must start with a letter (A-Z) NOT a number or an underscore.
- Field names are not case sensitive, so 'CUSTNAME' is the same as 'CustName' or 'custname'
- Field names must be AT LEAST three characters long.
- Although you should follow these rules for your field NAMES, you can use different TYPES of fields (character, numeric, logical, date etc.). However, matchIT can only match on character fields.
- Do not use any field names specified in the reserved list, as use of these names may conflict with matchIT's operation.

Words Not To Use As Field Names

The Online Help contains a list of "reserved names" which you should not use as field names.

Input Options

Basic Options

Input Format

Input Format is a drop down list from which you can select as follows:

- **Comma Delimited or COMMA** (commonly known as CSV): Use this setting for files that are either Comma or Comma and Quote delimited. This format refers to an ASCII text file in which records can be of variable length, ending with a carriage return and line feed. Commas separate the fields, and additionally double quotation marks can delimit character fields. For example:
 - "MR G. SMITH",456620,"123 CHURCH ROAD"
 - If the input data does not have the double quotation marks for character fields, this causes a problem if there are commas within a field e.g. Flat 103, 10 High Street intended as one address line. Therefore, this format cannot be guaranteed to be imported 100% successfully.
- **Fixed Width or SDF** (System Data Format): refers to an ASCII text file in which the fields and records all have fixed lengths, there being no field delimiters, and a carriage return and line feed as the record delimiter. This is a common choice for data coming from IBM and plug-compatible mainframes.
- **Tab Delimited or TAB**: Tab format is for an ASCII text file in which records can be variable length, ending with a carriage return and line feed. Fields are separated by the TAB character and can be additionally delimited by double quotation marks. This format is preferable to Comma Delimited, as there are unlikely to be problems if the fields are not surrounded by double quotation marks.
- **PIPE**: Pipe format is identical to tab delimited, except that the fields are delimited by the pipe ("|") character.

- **DBF Table or DBF:** Database File format refers to a dBase type file i.e. one conforming to the dBase / FoxPro DBF file standards. matchIT itself uses this standard for all its tables. If you select this format, you will then be prompted to indicate whether the DBF file containing the data conforms to matchIT's field naming standards (see "[Main File Layout](#)").
 - If you reply "No", then you must create a skeleton DBF which does conform to matchIT's field naming standards, into which matchIT will copy the data from your DBF. During Import the data from the input DBF file goes first to an intermediate temporary DBF file, to enable matchIT to transfer it to a file conforming to matchIT naming standards.
 - If you reply "Yes", then matchIT will change the Input Format from DBF to EXT to tell it just to extract or re-extract Match Keys, salutations etc. without importing the data into the matchIT Main File. You can use EXT format in a Job Script to extract or re-extract Match Keys in a Main File. If you are importing/extracting through the Import menu, you can use Generate keys to do this without changing the input format.
- **Access Table or MDB:** Access format; you will be prompted for which of the available tables in the database you want to import.
- **Excel Worksheet:** Excel v5.0, v6.0 or v7.0 format; note that if there are multiple worksheets, matchIT will only be able to read the first sheet. Use ODBC for multiple worksheets with the data to be imported being a defined name in Excel.
- **Regenerate Keys or EXT:** DBF format conforming to matchIT's field naming standards (see DBF input above).
- **DIF:** Data Interchange Format used by VisiCalc.
- **FW2:** Framework II files.
- **MOD:** Microsoft's Multiplan version 4.01.
- **PDOX:** Borland's Paradox version 3.5 or 4.0 database files.
- **RPD:** RapidFile version 1.2.
- **SYLK:** SYmbolic LinK interchange format used by Microsoft's Multiplan.
- **WK1:** Lotus 1-2-3 spreadsheet revision 2.x.
- **WK3:** Lotus 1-2-3 spreadsheet revision 3.x.
- **WKS:** Lotus 1-2-3 spreadsheet revision 1.A.
- **WR1:** Lotus Symphony spreadsheet versions 1.1 or 1.2.
- **WRK:** Lotus Symphony spreadsheet version 1.0.
- **XLS:** Microsoft Excel version 2.0, 3.0 or 4.0.
- **No CRLF:** Select this option for an ASCII text file in which records are of fixed length, not ending with a carriage return and line feed, or other specific separator. If you select this format, you will then be prompted to enter the number of characters in each record. During the Import operation, the data goes first to an intermediate flat file with a CRLF terminator for each record. The name of this file is SDFnnn.TXT (where nnn is the length of the record), and matchIT will delete this file when exiting. If the file contains ASCII null characters instead of spaces, you should reply "Yes" when asked if you want to convert nulls to spaces.
- **ODBC:** Select this option for a remote data source. You will be prompted for an [ODBC Connection file](#). This file must be created prior to import.

Next Reference Number

The Next Reference Number parameter must be numeric. This will be used for a matchIT generated unique reference field called UNIQUE_REF. Enter in this field the number at which you wish matchIT to start sequential allocation of reference numbers, for example, 1. Enter zero if you want a prompt, asking you for a start number, just before Importing commences. If you are Importing two such files prior to merging them, this facility will allow you to make sure the reference numbers in the merged Main File don't overlap.

Default Salutation

This parameter determines the default salutation, either where matchIT can't determine one (for example, C Smith or Chris Smith, which could be either Mr or Ms), or where the Prefix imported isn't sex-specific (Dr, for example). If you include the word 'Dear' in the default salutation field on the Basic Parameters screen (e.g. actually key in "Dear Customer" and not just "Customer", so the screen shows Dear as a literal followed by "Dear Customer" in the data entry box), then all the salutations derived by matchIT will start with the word "Dear" unless the salutation for the type of title (or prefix) specifies "Title" only. For example, Mr J Smith will result in a salutation of "Dear Mr Smith" whereas The Bishop of Liverpool will result in a salutation of "My Lord".

Default Gender

The Default Gender parameter is the sex to assume when matchIT can't determine whether the name is male or female e.g. Chris Smith, C Smith. If you set this parameter to M or F, matchIT will assume it to be male or female accordingly, and develop a salutation using Mr or Ms as the prefix.

Extract Postcode

If the input file contains UK postcodes which are not in a fixed field, set this parameter to "Extract" to search through the address lines for a postcode and to move it to the postcode field. matchIT will only extract full postcodes, having an outward half which is valid according to the Mailsort tables. Otherwise, if the postcodes are in the postcode field, you can select "Leave" to leave postcodes as they are. You can also select "Copy" to copy the postcode from the address lines into a fixed field, but to leave it in the address lines as well.

Use Full Name in Contact Field

Set this parameter "on" to include the full forename of any incoming name in the CONTACT field; just the initial will be used if the parameter is off. For example, if the parameter is on, and the incoming name is "John Smith", then the generated contact will be "Mr John Smith", if it is off, then the contact will be "Mr J Smith".

Omit Excluded Records

If matchIT finds Exclusion words such as "Deceased" in any field it is splitting up e.g. addressee, company name or address (if proper casing the address or using a phonetic address key), you can choose to automatically delete them during Import or Generate Keys. If you set this parameter "on", they are deleted, otherwise they are not. All excluded records are marked as such in the FLAG field (if present in the Main File Layout). Thus, if Omit Excluded Records is not switched on, you can choose to delete or mail these records after importing by selecting [View Records by Category](#).

Verify Postcode Format

If selected, this option verifies and corrects the format of the postcode, that is, to change numerics to alphas and vice versa where appropriate. This feature makes use of the rules concerning the alphanumeric structure of the postcode e.g. it changes "KT22 BDN" to "KT22 8DN" – it will change 0, 1, 5 and 8 to O, I, S and B, or vice versa, if that makes the postcode Mailsortable and alphanumerically correct. matchIT will not verify the format of postcodes that are not in the postcode field

Proper Case Incoming Data

If this parameter is set on, the Import step will convert the address lines in your records (labelled ADDRESS1, ADDRESS2... ADDRESSn) to their proper case. It will also convert ADDRESSEE, JOB_TITLE, DEPARTMENT, and COMPANY to the correct case. matchIT has a list of words it knows should be either all upper case, or all lower case, or a special mixture; these words can be found in the NAMES table, under the column PROP_CASE. This proper casing will handle punctuation, apostrophes and abbreviations.

matchIT's default rules for casing data are as follows: letters following an apostrophe are capitalised (e.g. "Mr O'Reilly"), as are letters following "Mc" or (subject to one of the Advanced Input Options) "Mac" at the start of a name (see "Mac Name Treatment"). Double-barrelled names have a capital letter after the hyphen. If the name or other word has an entry in the PROP_CASE column in the Names table, it is cased as shown there e.g. BSc, IBM, plc. If not in the Names table, words are all capitals if they contain no vowels, otherwise they are changed to initial capital followed by lower case letters.

To add new words that you would like matchIT to case differently from the rules above, or to change existing entries in the table, select [Names and Words](#) from the Jobs/Setup menu. The Equivalent field contains the word to be looked up, the Name field the matching equivalent (e.g. "Anthony" for "Tony"), and the Type field denotes what sort of word is being added. The Sex field is only used for forenames and prefixes, and the Salutation field is only used for prefixes. The Proper Case field is where any special casing of the word should be entered.

Upper Case Post Town

This applies to UK addresses only. Set this parameter "on" to convert the post town in the address to capitals, according to Royal Mail preference. Note that, if the Proper Case Incoming Data parameter is set "off", then this parameter will not be available.

Note: matchIT will make UK post towns in the relevant Mailsort table all upper case, if it is clear that it is the post town. As the Mailsort table (TOWNS.DAT) contains only the first 10 characters of the town name, there are some longer town names and names consisting of more than one word that it will not be able to make upper case.

Nationality Options



Nationality of Data

As there are other settings (including match key defaults and weights) that need to be set for processing foreign data, you can't change Nationality via this screen: you must use the Save/Restore Setup (see Online help for more details) option under the Setup menu to change the nationality settings.

Extract Country

When processing address lines, matchIT can either extract (i.e. move) or copy "floating" countries from the address lines to a fixed field; set this parameter to "Extract" or "Copy" if required, or else set to "Leave". Note that a field labelled COUNTRY is required to put the data into – if this parameter is switched on before you use the Setup Wizard, it will automatically add the Country field to the main File Layout. If this field is not present, the setting of this parameter is ignored.

Note also that the data in the field will be proper cased if that option is switched on – if you want it in upper case, you must amend the entries for the countries using the Names and Words option under the Jobs/Setup menu.

Extract State/Province

When processing address lines, matchIT can either extract (i.e. move) or copy "floating" states and provinces from the address lines to a fixed field; set this parameter to "Extract" or "Copy" if required, or else set to "Leave". Note that a field labelled STATE is required to put the data into –

if this parameter is switched on before you use the Setup Wizard, it will automatically add the State field to the main File Layout. If this field is not present, the setting of this parameter is ignored. Note also that the data in the field will be proper cased if that option is switched on.

Abbreviate States

Choose this option to have matchIT abbreviate States or Provinces when processing address lines e.g. to change Pennsylvania to PA.

Expect Building Number Before Apartment Number

This parameter is used when addresses processed by matchIT contain two numbers in the address line e.g. 12/24 High St. If this parameter is "on", then the first number is taken as a premise number and the second as a flat number, and vice versa if it is off. This is important when matching with the 'Must have premise match?' parameter on, or extracting or copying the premise. As a rule of thumb, set this parameter off if your file contains mainly UK addresses, otherwise turn it on.

Advanced Input Options

The screenshot shows the 'Advanced Input Options' dialog box with the following settings:

- Consider casing of input data? (Spinner: 0) Scan address lines for names?
- Report on unrecognized words? (Dropdown: No) Remove exact duplicates on Import?
- Join together company initials? (Spinner: 1) Default street address line
- Extract company name? (Text: ,) Name field delimiter
- Extract job title?
- Generate default married prefix for multiple names? Mac Name treatment
- Do not populate blank prefix when casing? (Spinner: 2) Minimum Forename Length
- Check for data truncation during import? (Dropdown: Copy) Copy House/ Building number?
- Type of fields to check: (Dropdown: Name and Address Only) (Dropdown: Leave) Copy/Move Town?
- Do not check files of more than: (Spinner: 500000) records (Dropdown: Leave) Copy/Move County?

A 'Done' button is located at the bottom center of the dialog.

The Advanced Input Options are described in the Online Help.

ODBC Manager

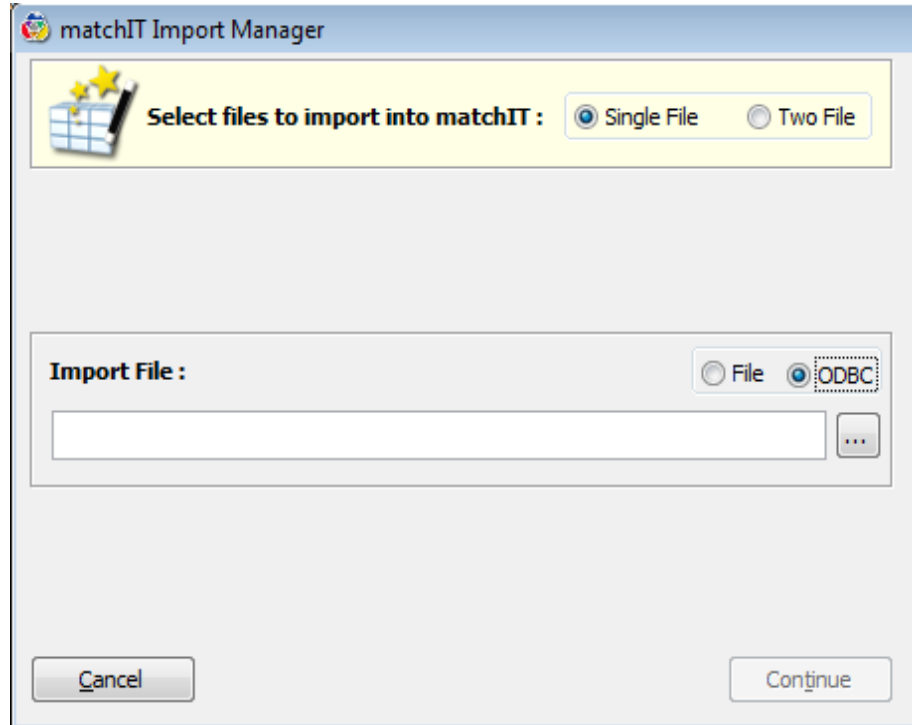
matchIT can read and export data using standard ODBC connections. Supported ODBC drivers include the standard ones for SQL Server, MySQL, DB2, Oracle and Access.

When importing data, the user must create a single table or view containing the data which is to be read into matchIT – for Access, this can be a query. The user can select which fields from the table or view they would like to import. matchIT uses an ODBC Connection file to import the required information from the chosen data source, as well as export data back to the original source database. On output, the user can choose to create a new table, overwrite an existing table, or delete records from within a table and reassign orphaned records in a child table.

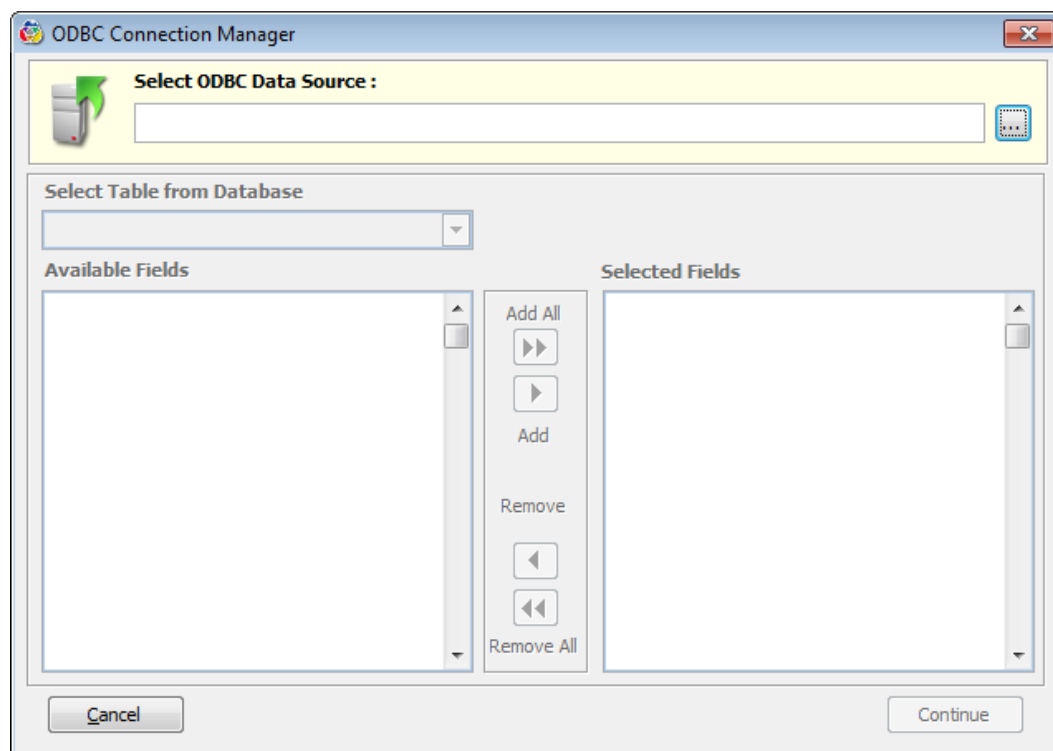
The following sections explain matchIT's ODBC functionality in detail, covering all of the major options and processes.

Creating an ODBC Connection file


You can create an ODBC Connection file by selecting the ODBC Connection Manager option from the File menu or by choosing the ODBC option in the matchIT Import Manager window, as shown below (to access the ODBC Connection Manager window - click "..." after choosing the ODBC radio button).



The ODBC Connection Manager window is then displayed as follows.



Choosing an ODBC Data Source

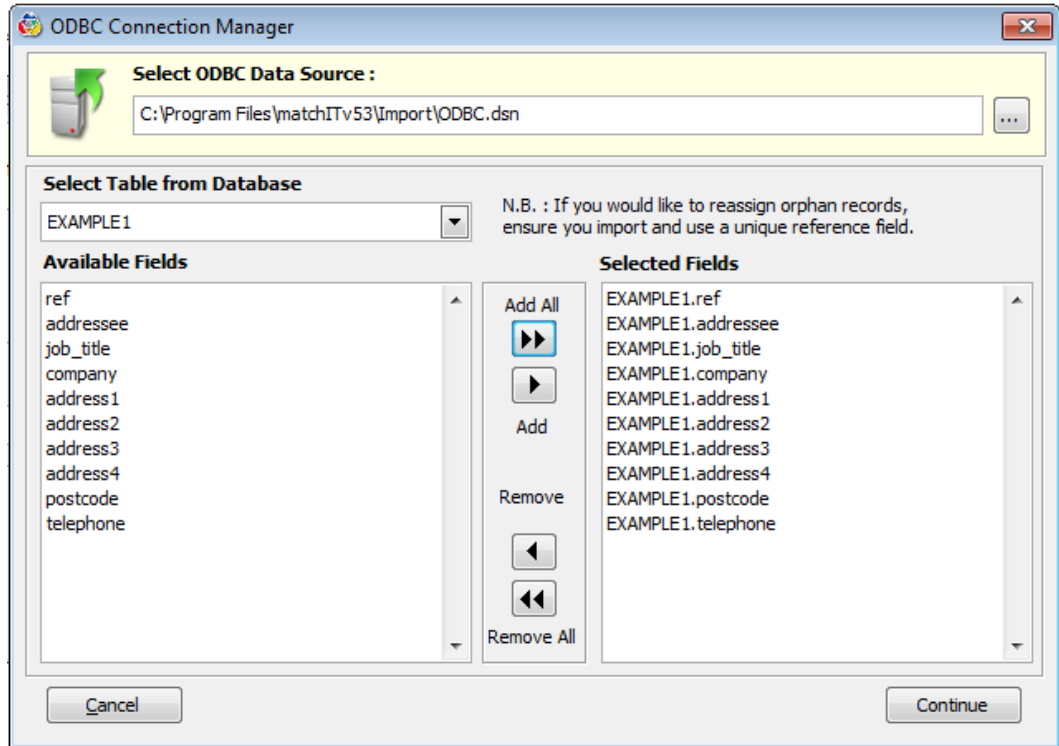
To choose an ODBC Data Source, click the  button. If prompted, enter the Login ID and Password for the data source.

Selecting a Table

After choosing a data source, select a table or view from the drop-down list of available tables. This defines the data that will be imported.

Choosing Which Fields to Import

When importing a table or view, you can choose what fields you would like to import. This feature can help improve processing time by limiting the size of large files with numerous fields that are unrelated to the matching process, as well as reducing the setup time required in matchIT. You can select fields individually by double-clicking, select a block of fields by highlighting them and clicking "Add", or use the Add All button.



Importing via an ODBC Connection

Once you have created an ODBC Connection file, you can import the data selected via matchIT's Setup Wizard or by importing it into an existing matchIT Main File. Both methods are described below.

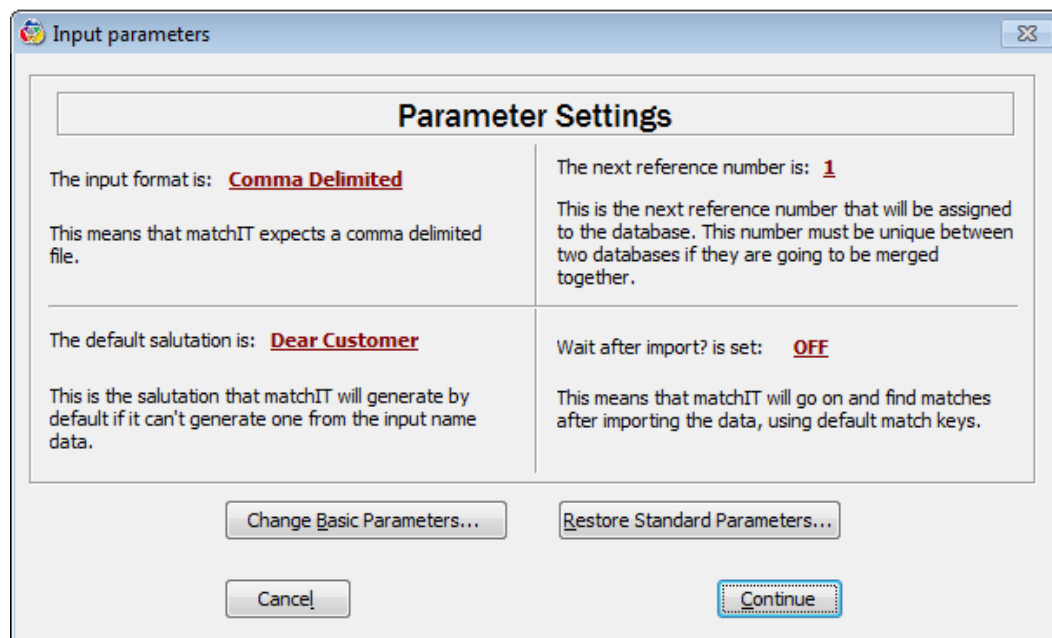
Using matchIT's Setup Wizard to Import ODBC Data

The matchIT Setup Wizard can be launched by selecting one of the file wizards or by selecting the Setup Wizard option located under the Import menu. Choosing the latter method will prompt you for the file that you wish to import, so you can only use this if you have previously created an ODBC Connection (*.ODB) file. However, starting the Setup Wizard via the Single File or Two File button will allow you to specify an ODBC Connection file or create a new one, as discussed in "Creating an ODBC Connection file".

Importing ODBC Data into an Existing Main File

To import ODBC data into an existing matchIT Main File, the DBF structure of the Main File must be consistent with the fields selected in the ODBC connection. If the field layout is not consistent between the DBF and the ODBC connection file, data will be misplaced causing problems during import or matching.

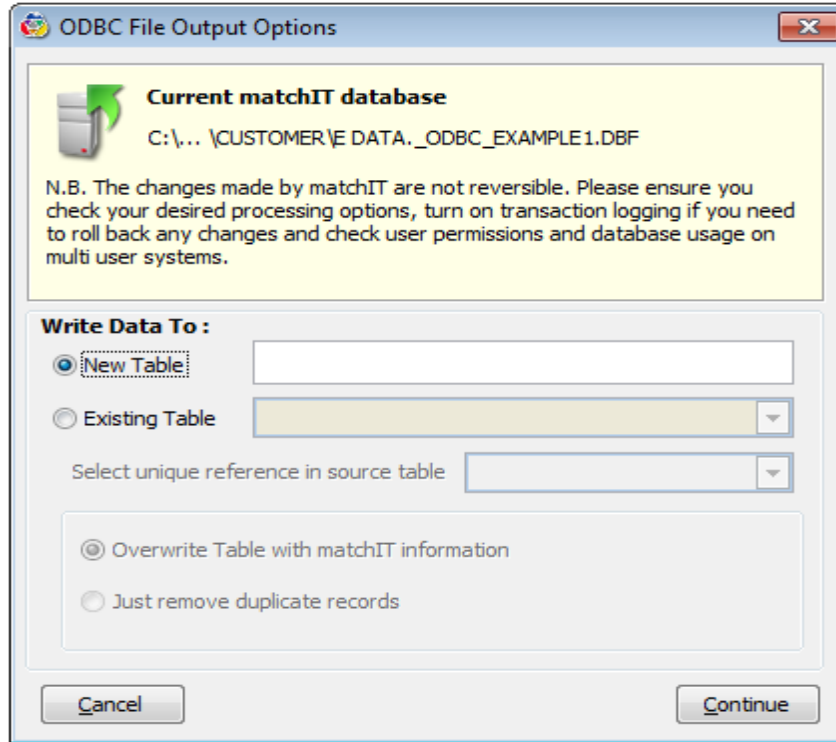
You can import records into an existing matchIT Main File by selecting the Import Records option from the Import menu. If the Main File is not already open, matchIT will prompt you for the file. Next, you will see the Input Parameters window, as described in [Importing without using the Setup Wizard](#).



Once you have reviewed and changed the parameters if necessary, select the Continue button to specify the ODBC Connection file that you wish to use. matchIT will then import the data and continue with processing as requested.

Exporting via an ODBC Connection

matchIT can use the same ODBC Connection file to export data back to the data source. To do this, choose an output format of ODBC when specifying the output options. However, take careful note of the created ODB file name and location assigned by the Setup Wizard, so that you can select it for output as you will be prompted for the ODB file. You will then see the following window:

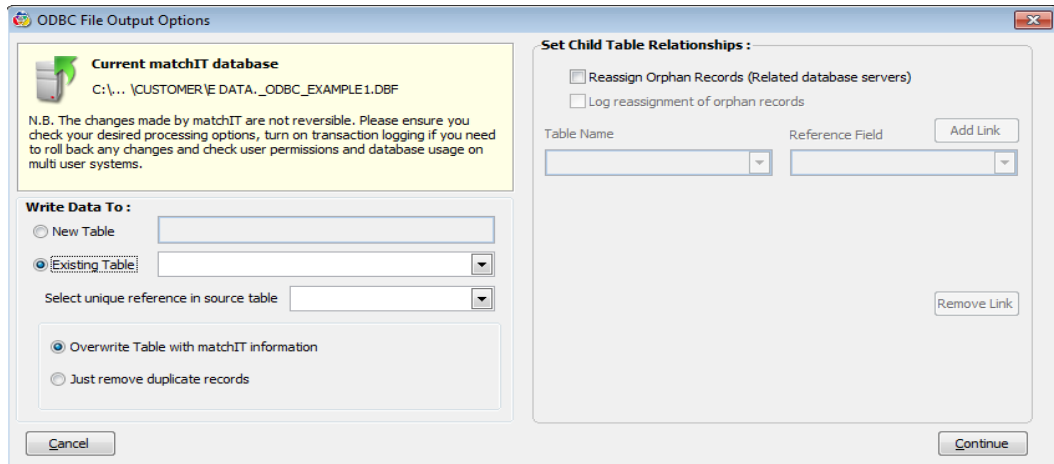


Creating a New Table

To create a new table, choose the "New Table" radio button and enter a table name. The new table will be created in the Data Source specified by the ODBC Connection file.

Overwriting an Existing Table

To overwrite an existing table in the source database, choose the "Existing Table" radio button. Choosing this output option allows you to specify other options which are only available for this type of output. The resultant output window is displayed below.



Overwrite Table with matchIT information

This option will overwrite an existing table with information from the matchIT Main File. The type of output will depend on what output option was chosen (unique records, matched records, or flagged records) and the field layout will be determined by the layout option(s) chosen by the user.

Just remove duplicate records

This will remove the duplicate records that you flagged within matchIT from the existing table that you selected.

Both the "Overwrite Table with matchIT information" and the "Just remove duplicate records" options can cause relational data to become corrupt if careful steps are not taken. matchIT has integrated "Child Table Relationships" to help cope with this task.

Reassign Orphaned Records

This functionality is used when working with parent and child tables that are related via a specific reference field. Generally the parent table will be (or should be) a unique list of names (or companies) and addresses. The child table will often be transactional data, linked to the parent table via the reference field. Each parent record will relate to any number of child records in a one-to-many relationship. matchIT is commonly used to dedupe a parent table. This could result in orphaned child records, where parent records are removed and the child records that relate to the removed records are left orphaned (where the references in these child records no-longer relate to references that exist in the parent table).

The "Reassign Orphaned Records" functionality enables users to specify any related child tables during the output step (when writing the deduped parent data back). It will then re-populate the references of the records in the child table(s) with new references. The new references will be those of the records that the original parent records were deleted against.

To use this functionality in matchIT, there must be a parent table and a child table. The child records must contain references linking them to parent records. Parent Data should be imported via an ODBC connection, and upon doing so, it is essential that the reference field linking the parent and child tables together is labelled as 'unique_ref' during the Setup Wizard stage.

The following example illustrates this...

PARENT TABLE

FRED WATERS, 1 High Street, Leatherhead ID110

MR F WATERS, 1 High St, LEATHERHEAD ID103

CHILD TABLE

F WATERS Transaction 31763 ID103 - changed to ID110

F WATERS Transaction 332140 ID103 - changed to ID110

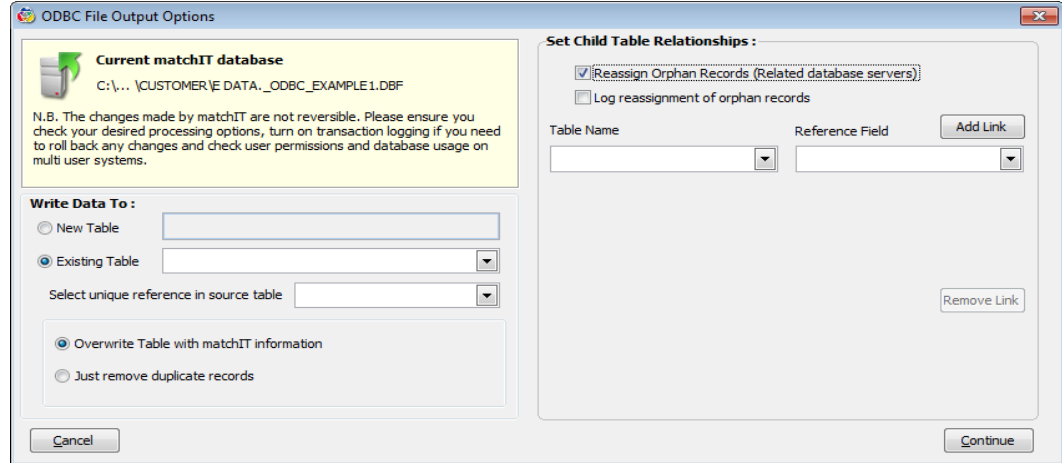
In this example, all F WATERS records in the child table became orphaned, as their parent record had been removed in the parent table. The references for the child records have now been re-

assigned to the new parent record. So 'MR F WATERS' has been removed and all transactions in the child data that related to this record, now relate to 'FRED WATERS' instead.

After importing the parent data and flagging the duplicates, you can write the data back to the source database using the Output To File screen, Output Flagged Records or Output Matched Records. You can select the required fields as normal for the type of output that you are using.

Make sure that the same ODBC connection used to import the data is selected as the output destination, and select ODBC as the output format.

If you select ODBC as the output format, matchIT will display the 'ODBC File Output Options' screen:



The 'Reassign' functionality is only relevant when overwriting the source table, so from the 'Existing Table' drop-down, select the original parent data table. Next, select 'Reassign Orphan Records' on the right-hand side of the dialog. The child table and the corresponding reference field can then be specified, linking the child records to the parent records. Click on 'Continue' to export the cleaned parent data and re-populate the references in the child table where necessary.

Non Mailable Records

The 'Non Mailable Records' functionality is designed to search for, flag and report specifically on records containing 'mail exclusion' words. The user can add, remove or edit mail exclusion words as required. In addition, mail exclusion words can be grouped together where they represent similar exclusion types. For example, "HMP" and "Prison" can both be added to the same group, as could "Goneaway" or "Moved".

matchIT performs the search for mail exclusions during import, or when re-generating keys on a pre-imported DBF file. All input fields are searched.

When mail exclusion words are found in a file, they are listed and counts of each are displayed in matchIT's standard Data Summary report.

The user can browse the records containing mail exclusions by the type of exclusion, from matchIT's 'Import Details' dialog. So, using the previous example, the user could choose to browse all 'Prison' exclusions, which may display records containing words such as 'HMP', 'Prison', etc.

Adding/Removing Mail Exclusion words

All mail exclusion words must be added to matchIT's mail exclusions table; 'mail_exclusions.dbf'(located in the matchIT's DAT sub-folder). The easiest way to do this is to browse the table via **View>View Table**, from matchIT's main menu. Upon selecting mail exclusions table, it will be displayed on screen and can be edited as required. Of the five fields displayed, each field (except the 'COUNTS' field) must be populated by the user when a new mail exclusion word is added. A description of each field is as follows:

- **EXCLUSION**
Contains the actual mail exclusion word that matchIT will search for in the input data. All entries here must be upper case. Limited to 10 characters.
- **DESCRIPTIO**
Contains a description specific to the exclusion word. This will be displayed in the Data Summary report. Limited to 40 characters.
- **XTYPE**
Contains a code, which will be copied into exclusion records within the working DBF file. Limited to 2 characters. Must be unique to each group/type of mail exclusions (not each individual exclusion word).
- **TYPE_DESC**
Contains a description of the exclusion group/type. All mail exclusion words in the same group, with the same XTYPE field value should have the same TYPE_DESC. This description will ultimately be displayed in the 'Import Details' dialog, where the user chooses the group/type of mail exclusions they wish to browse. Limited to 20 characters.
- **COUNTS**
This field is populated by matchIT. It should not be modified by the user.

To add a new field to the mail exclusions table, select **Table>Append New Record**. To remove an exclusion word, simply delete the record from the table by clicking on the small deletion cell to the left of the record.

After updating the mail exclusions table as require, the mail exclusion words must also be added to (or removed from, depending on what you are doing) matchIT's standard Names and Words table via **Job/Setup>Names and Words**. They should be categorised as type 'Exclusion'.

Enabling/Preventing Mail Exclusion in New Data Files

matchIT will only ever scan for mail exclusions on a file, if the file contains a field labelled **MAIL_FLAG**. It is therefore essential to add this field during the Setup Wizard stage, before the import begins. You can enable this feature by ticking the 'Generate Mail Exclusions Flag Field' option under 'Generate Additional Fields' in the Processing Options screen. This field is populated with the XTYPE codes from the 'Mail_Exclusions' table, where records contain mail exclusion words. It should therefore be added with a width of at least 20, to cater for records that may contain multiple mail exclusion words.

Where mail exclusion scanning is not required, it is not necessary to add this field.

Reporting of Mail Exclusions

Mail exclusions are displayed on the Data Summary report. The report shows the type of mail exclusion word present in the mail exclusions table, as well as the corresponding exclusion code, count of occurrences in the work file, and percentage of records in the file containing the exclusion word.

If the file that is being reported on is not the last file that had keys generated, matchIT will re-count the mail exclusions. Therefore the report may take a little longer to produce than usual.

If a MAIL_FLAG field is not present in the dbf that is currently open, the Mail Exclusions section will not appear in the report at all.

The Mail Exclusions area of the Data Summary report is displayed below:

Mail Exclusions			
Description	Code	Number of Records Containing Exclusion Word	Percentage of Records Containing Exclusion Word
British Forces Postal Office	BF	2	1.60%
Care Of	CO	1	0.80%
Her Majesty's Prison	FR	3	2.40%
Other Exclusions	OT	1	0.80%

NB: A maximum of 12 mail exclusion words will be displayed above. Please contact helpIT systems if your mail exclusions table exceeds 12 entries.

Browsing Records that contain Mail Exclusions

After importing a file of re-generating keys in a file, any records that are found to contain mail exclusions can be browsed via **Import>Import Results>View Records By Category**.

To browse a specific category of mail exclusion, tick the 'Use Mail Exclusions' tick-box in the bottom right-hand area of the screen. A drop-down menu will now be enabled, which is populated with each different mail exclusion type found in the mail exclusions table, as pictured below:



To browse records containing mail exclusion words falling into any of the categories listed, select the category and choose 'Continue'. You can also modify the output options at the bottom of the main dialog if you wish to send the records to a separate DBF, report on them, or produce a PDF report displaying them.

If a MAIL_FLAG field is not present in the dbf that is currently open, the Mail Exclusions section will not appear in this dialog.

Maintenance

When re-installing matchIT or moving matchIT to a different machine, it is essential that both MAIL_EXCLUSIONS.DBF (located in the matchIT root directory) and the DAT sub-folder are copied to the new installation. This will ensure that any customisation carried out will not be lost.

It is also advisable to regularly make backup copies of these files, in case the matchIT installation is accidentally removed or overwritten.

Mailsort

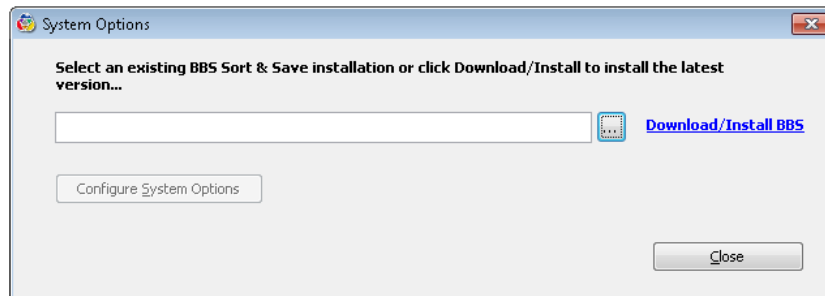
Mailsort Schemes

Royal Mail and other carriers such as Whisl (TNT), Citipost, Secured Mail and UK Mail provide discount schemes for those who mail in bulk. The carriers available within the software will depend on which sortIT modules that you have purchased, e.g. if you only have the sortIT Pro module, the only carrier available will be Royal Mail, if you have sortIT Pro and sortIT Pro DSA then you will also see all the Downstream Access carriers such as Whisl, Citipost etc. This documentation assumes that all sortIT modules have been activated so please disregard as necessary. Each of these carriers offer a range of discount schemes, each scheme suited to a specific type of mailing. This documentation does not describe the various schemes as these are fully documented in publications made available by the corresponding carrier, which you can obtain from your carrier account manager.

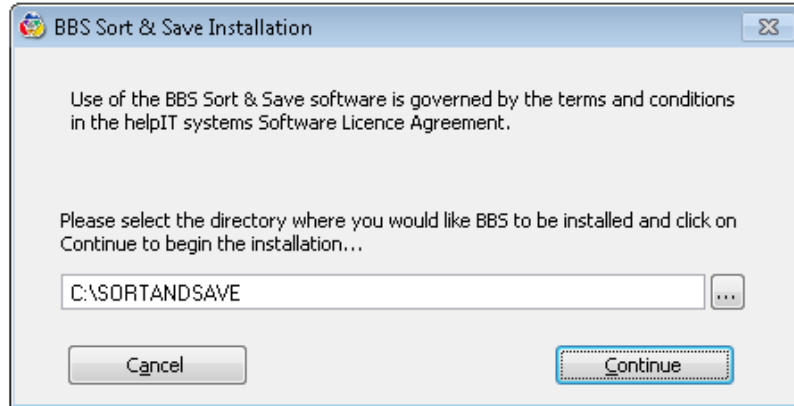
BBS Installation

The BBS suite must be installed locally, before the Downstream Access sortation can run. To download and install the BBS suite, open MatchIT and navigate to Mail Sortation > System Options, then click on **Download/Install BBS**.

Download/Install BBS: Where an internet connection is available; this will begin the download of the BBS installer from the helpIT systems web site. The length of time taken to download the BBS installer will depend on your connection speed. When the download is complete, the BBS Installation screen will appear, as pictured below:



If you wish to install BBS somewhere other than the default location (i.e. C:\SORTANDSAVE) then click on the ellipses to specify a different location. Click on Continue to start the Installation process. This process will usually take less than 30 seconds. On completion, you will be returned to the main System Options screen.



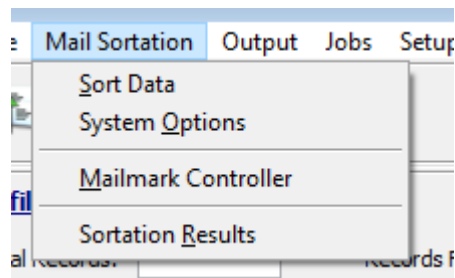
Mail Sortation

There are multiple places from which the sortation process can be started:

1. The sortation can be started during wizard processing (i.e. the Single File Wizard or Two File wizard) by clicking on the “Do Mail Sortation” option after import processing.
2. An alternative to the wizard buttons is to select Sort Data from matchIT’s main Mail sortation menu. This would typically be used when sorting a file that was processed at an earlier stage.

Please note that however you decide to sort your data, due to sortation limitations you can only sort up to 8 address lines plus the postcode. Any address lines beyond 8 will not be included in the sortations.

In order to access the sortation options and menus, you can click on Mail Sortation as pictured below:



Sort Data starts the sortation process, by displaying the input screen for the item details where you can specify the sortation options you want to use for your data.

System Options this displays the location of the Sort&Save directory as well as providing the options to re-download BBS and configure the System Options for BBS.

Mailmark Controller displays the Mailmark Controller. From here you can manage and view current Mailmark Jobs.

Sortation Results displays the Results of the Mail Sortation associated with the current open table.

Mail Sortation Options

From here, the options specific to the current sortation can be set. These options are always displayed prior to the sortation step, unless sorting from an automated job script.

The screenshot shows the MATCHIT - SortIT application window. The window title is "MATCHIT - SortIT". The interface is divided into several sections:

- Carrier Details**: A tab at the top left.
- Item Details**: A tab at the top right, currently active. It contains:
 - Item Weight**: A text input field containing the value "10".
 - Format**: Radio button options for Letter (selected), Large Letter, A3 Parcel, and Parcel.
 - Format Variant**: Radio button options for Manual (selected), Mech, Barcoded, OCR, and Mailmark.
 - Sortation Level**: Radio button options for Directs and Residues (selected) and Residues Only.
- Job Parameters**: A vertical sidebar on the left side of the window.
- Mail Type**: Radio button options for Advertising Mail (selected), Business Mail, and Publishing Mail.
- Sustainable**: Radio button options for Not Sustainable (selected), Entry Level, and Intermediate Level.
- Delivery Speed**: Radio button options for First Class (selected), Second Class, and Economy.
- Container**: Radio button options for Bags (selected), Trays, and Cage Bundles.

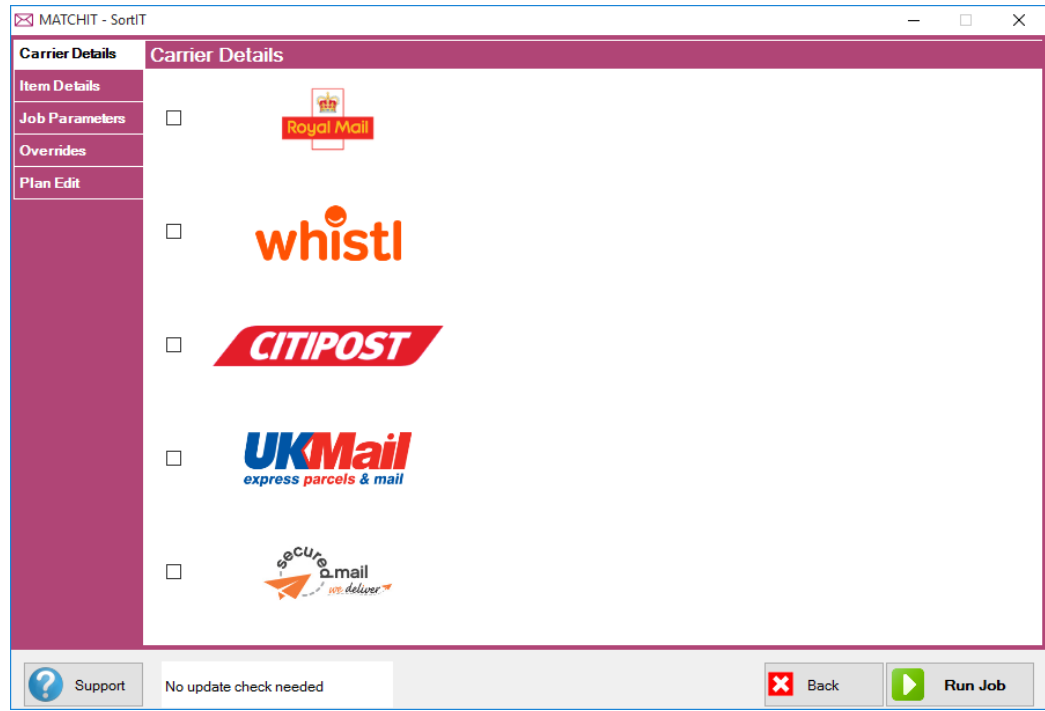
At the bottom of the window, there is a footer bar with the following elements from left to right:

- A "Support" button with a question mark icon.
- The text "No update check needed".
- A "Back" button with a red 'X' icon.
- A "Run Job" button with a green play icon.

When you click "Sort Data" the SortIT module will open on this screen. Here you can input how you want your data to be sorted.

Carrier Details

In this menu you can choose which carrier to do a mail sortation for.



When a carrier is selected you can then use a drop down list on the right to choose what account to use for the mail sortation.

You can also edit the accounts by highlighting them in the drop down list and clicking the "Edit..." button, this allows you to edit the details of the accounts, however you cannot create new accounts from this view.

You can also use multiple carriers in order to compare prices of sortations between different carriers. The system will automatically choose the plan which costs you less for the actual sortation.

Item Details

Item Weight: Enter the fixed weight in grams, for each item being posted. This can range between 1g and 2000g.

Format: Select the corresponding item format, which will be determined by the dimensions and weight of the items. The item formats that are listed will be restricted by the **Item Weight** that is set in the input box above. For details on the various item formats available, please refer to up-to-date documentation supplied by Royal Mail or contact your Royal Mail account manager.

Letter Formats:

Letters: Slightly bigger than half A4, up to 5mm thick, and weighing up to 100g

Large Letters: Slightly bigger than A4, up to 25mm thick and up to 750g

A3 Packets: Maximum of double A4 size, up to 25mm thick and up to 750g

Parcels: Any item that doesn't fit the other formats, up to a maximum of 2000g

Format Variant:

Manual: Manual Format, is the variant used for items which cannot be sorted through a machine, and will therefore be needed to be sorted manually.

Mech: is essentially a variant of Manual and is used when the item doesn't meet the requirements for OCR, but can be sorted by machine. It primarily effects what is printed on the bag labels.

Barcoded: This option is for letters, and is recommended for more creative items as there are fewer design constraints. You are required to print a 4-state Barcode on the item,

which is an iteration of the recipient's postcode and premise number or name with some additional information

OCR: This format is used when the item can be sorted by a machine and meets all required specification for OCR sortation.

Mailmark: This is an option for letters and large letters and offers Batch level reporting. This requires a Mailmark barcode to be applied to each item, this Mailmark barcode is unique to the mail piece and contains data (e.g. sender, recipient postcode, mail piece characteristics) encoded within

Mail Type:

Publishing Mail: is reserved exclusively for regular mailings of periodicals like magazines, newsletters and journals.

Advertising Mail: is available for items that meet certain conditions, and is somewhat cheaper than Business Mail, which is described below. They must satisfy a number of requirements essentially to ensure that this is genuine advertising material, and must contain effectively the same advertising message for each recipient.

Sustainable Advertising Mail: is a variant of Advertising Mail that offers additional discounts above standard Advertising Mail. There are two levels: Entry level and Intermediate Level. The choice of this depends mainly upon the type of paper that is used for the mailing, and some other conditions, which are defined in detail in Royal Mail's literature.

Business Mail: is the service to use for all types of mailing that do not fall into the previous categories.

Job Parameters

In this screen you can change the output details.

Title for reports: This title will head all the reports produced by the sortIT module

Mailing Reference: The Mailing Reference is your reference number/name for this mailing. It is printed on the summary report, and will be provided as the name for the job if uploaded for Mailmark

Cell Reference: This field allows you to enter a Cell reference that will be printed on the CPL report.

Purchase Order Number: This Purchase Order Number can be entered here, and will be printed out on the CPL report in the results of the mailing.

Collection date: Collection Date should be set to the date on which you expect the job to be collected by Royal Mail or a DSA carrier. If the job is for Royal Mail retail, then the Handover Date is set to the Collection Date automatically, and is not displayed. For DSA carriers, then either you can enter the Handover Date manually, or you can check the Calculate automatically box and then the system will fill in the Handover Date as the next working day

At the bottom of this page you have a tick box for “Show advanced job options for Overrides and Plan Editing”. Should you tick this option, you are given access to the override options, as well as the ability to change what mailing is used, this means that should you desire to change the mailing service, you can use the Plan editor, accessible by checking this Tick-Box. (This is especially useful if you are comparing prices of mailings, and desire a different service to the cheapest option).

Comparing Mail Service Prices

Carrier & Item Details

If you want to compare prices between different carriers, you will need to select the carriers (and an account).

When you then run the mailing the system will check what the most cost effective plan is, and mail the data accordingly. (Note: you cannot compare prices for a Mailmark mailing in this manner, and would have to compare prices manually. This is due to the need to select a SCID for the mailing)

Job Summary & Comparison

Once the mailing is complete, you will be able to find the details of the two mailing service options within the Job Summary report in the results tab.

Here you will be able to see the best plans that the system could develop using the mailing options available.

This information will show the costs associated with each mailing, as well as the number of the records that were placed into each option within the plan.

Carrier Account Options

Each of the available carriers (i.e. Royal Mail, Whistl(TNT), Citipost, Secured Mail and UK Mail) has an associated set of account options. These options can be set using the appropriate carrier-specific Account Options menu. To access any of the Account Options menus, they can be edited by going to the System Options screen and clicking configure system options. Then, from within the screen, after selecting the required carrier, you will be taken to the parameter options screen, using the navigation bar on the left, move to the accounts sub-tab for the desired carrier and you can add or edit the accounts.

The account options for each carrier are stored in carrier account files in the PARAMS sub-folder of the BBS installation directory. When the carrier account options menu is accessed, for any particular carrier, matchIT scans for existing account files for that carrier, and then lists these in the account carrier options. It is then possible to select an account file to use for the next sortation.

If there are no existing account files for either Royal Mail, Whistl(TNT), Citipost, or UK Mail, then the carrier options menus for these carriers can be used to create new account files. Similarly, they can be used to edit existing account files and delete existing account files.

The Secured Mail Account Options menu does not provide the ability to create, edit and delete accounts. Instead, it simply allows an account file to be selected and then displays the main options within that account file. This is because it is generally the case that Secured Mail account files are actually supplied from Secured Mail without any further editing being required. If a Secured Mail account file does in fact require editing, this can be carried out using a text editor, outside of MatchIT.

Each separate carrier account options screen is explained below.

Royal Mail Account Options:

The screenshot shows a web application window titled 'sortIT - System Options'. On the left is a navigation tree with categories like 'General', 'Defaults', 'Reference files', 'Bag labels', 'Royal Mail', 'Parameters', 'whistl', 'Citipost', 'UK Mail', 'Secured Mail', 'Mailers/Accounts', 'Tariffs', and 'Mailmark'. The 'OBA Accounts' option under 'Parameters' is selected and highlighted in blue. The main content area is titled 'OBA Accounts' and features a dropdown menu labeled 'List of OBA Accounts' with 'Test OBA Account' selected. Below this is a section titled 'OBA Account Details' containing several input fields: 'Account Name' (Test OBA Account), 'Account Number' (999999998), 'Publishing Issue Number', 'Publishing Mag Name', 'Posting Location Number', 'Poster Email', 'Poster Name' (Test Poster), 'Poster Address' (Border House), and 'Poster Postcode' (CH3 6PT). At the bottom of the form are two buttons: 'Create New Account' and 'Delete Account'. The footer of the window includes a 'Support' link, a 'Reset Page' button, and a 'Close' button with a red X icon.

List of OBA Accounts: Select an existing OBA account from the drop down at the top of the page, this links to the PARAMS folder of the BBS installation directory. Upon selecting a file, the options within that file will be displayed below.

Create New Account: This button will save the details in the boxes below, to a new account saved in the PARAMS folder.

Delete Account: Delete the account file that is currently selected in the Account File drop-down menu.

Account name (mandatory): A field to help identify the account in the drop down list.

Account Number (mandatory): Enter a nine digit numeric client ID as supplied by Royal Mail. (Note that the OBA account number that you receive will be 10 digits long, you need only input the last nine digits as the starting digit is always a zero).

Publishing Issue Number: This number must be supplied when using any of the presstream services. It can be up to 8 characters long.

Publishing Mag Name (Publishing Magazine Name): This number must also be supplied when using any of the Presstream services. It can be up to 50 characters long.

Posting Location Number: This is the 10-digit Poster Location that you specify to OBA.

Posting Email: The email address that you use with OBA should be entered here.

Poster Name: This is the name of your company, which will appear on various OBA reports.

Poster Address and Postcode: This is a single line of address details, and then the postcode, of your company, which will appear on various OBA reports.

TNT Account Options:

whistl Accounts: Select an existing TNT account from the dropdown list. These accounts are then saved as files within the PARAMS folder of the BBS installation directory. Upon selecting a file, the options within that file will be displayed below.

Create New Account: This button will save the details in the boxes below, to a new account file which is saved in the PARAMS folder.

Delete Existing Account File: Delete the account file that is currently selected in the Account File drop-down menu.

Account name: A field to help identify the account in the drop down list.

Save New/Update Existing Account: If there isn't already an account file representing the four digit client ID in the Client ID field, create a new account file containing the settings below. If there is already an account file representing the current client ID setting, then update the settings in that account file.

Client ID (mandatory): Enter a four digit numeric client ID as supplied by TNT.

Mailing House ID (mandatory): Enter a single character alphanumeric mailing house ID as supplied by TNT.

Collection Depot (mandatory): Select an existing TNT collection depot, from the list of available depots.

Mailing Segment: Enter a two digit numeric mailing segment between 01 and 99. This will automatically increase by 1 during each TNT sortation. When the Mailing Segment reaches the Range High value, it will automatically reset to the Range Low value, rather than exceeding it.

This simply helps track and control the number of mailings that are carried out in any given space of time, e.g. when there is a limit on the number of mailings that can be processed in one day. This is especially useful where multiple users are sorting mailings on different computers. E.g. the first computer could be allocated segments 1 to 10, the next computer 11 to 20, etc.

Range (low): Enter a two digit number between 01 and 99. This number will determine the lowest setting that can be assigned to the Mailing Segment setting. E.g. if this is set to 20, then you will be forced to manually set the Mailing Segment setting to a number between 20 and the Range High setting. This number must not exceed the Range High setting.

To (high): Enter a two digit number between 01 and 99. This number will determine the highest setting that can be assigned to the Mailing Segment setting. E.g. if this is set to 20, then you will be forced to manually increase this setting to a higher number if the Mailing Segment is greater than 20. This number must not be lower than the Range Low setting.

Close: Automatically saves the current settings and returns to the main System Options screen.

Citipost Account Options:

The screenshot shows the 'Citipost Accounts' configuration window. On the left is a navigation tree with 'Accounts' selected under 'Citipost'. The main content area is titled 'Citipost Accounts' and shows a dropdown menu for 'National only whistl Account : (CPODEMONAT.TXT)'. Below this are several input fields and buttons:

- Account Name:** National only whistl Account
- National whistl Account Number:** 90001 (with a 'View Account' button)
- Zonal whistl Account Number:** (empty) (with a 'View Account' button)
- Contact Name:** J Smith
- Phone Number:** 07777 777777
- Contact Email:** someone@hotmail.com
- Client Name:** SomeCo Ltd
- Mailing House:** Someco House
- Collection Addr 1:** High Street
- Collection Addr 2:** SomePlace
- Collection Addr 3:** SomeTown XX1 1AA

Buttons include 'Create New Account', 'Delete Account', 'View Account', 'Reset Page', and 'Close'. A 'Support' button is at the bottom left.

Citipost Account File: Select an existing Citipost account file from the dropdown. Upon selecting an account, the options within that account will be displayed below.

Create New Account: This button will save the details in the boxes below, to a new account saved in the PARAMS folder.

Delete Existing Account File: Delete the account file that is currently selected in the Account File drop-down menu.

Account name: A field to help identify the account in the drop down list.

Zonal whistl Account Number (mandatory): Five digit alphanumeric account number, as supplied by Citipost.

National whistl Account Number (mandatory): Five digit meter number as supplied by Citipost.

Contract Type & CDA Contract Number: This should normally be set up as shown; they would only change if you have a CDA agreement directly with Royal Mail Wholesale.

Contact Details (mandatory): This information should be populated as it is needed on the Citipost Posting Docket.

Close: Returns to the main System Options.

UK Mail

The screenshot shows the 'sortIT - System Options' window. On the left is a tree view with the following structure:

- General
 - Defaults
 - Reference files
 - Bag labels
 - Royal Mail
 - Parameters
 - OBA Accounts
 - whistl
 - Parameters
 - Accounts
 - Citipost
 - Parameters
 - Accounts
 - UK Mail
 - Parameters
 - Accounts
 - Secured Mail
 - Parameters
 - Mailers/Accounts
 - Bag Ranges
 - Tariffs
 - Mailmark
 - Settings
 - SCID Accounts
 - Update settings
 - Licence

The main content area is titled 'UK Mail Accounts'. At the top, there is a dropdown menu for 'UK Mail Accounts' with 'Test Account : (UKMBBS01.TXT)' selected. To the right of this dropdown are two buttons: 'Create New Account' and 'Delete Account'. Below this is a form with the following fields:

- Account Name: Text input field containing 'Test Account'.
- Account Number: Text input field containing '1888888'.
- Mailing ID: Text input field containing 'M63'.
- Cell ID: Text input field containing 'CELL01'.
- Associated SCID: Dropdown menu with 'No Associated SCID' selected.
- DSA Account Type: Dropdown menu with 'NATIONAL' selected.
- Manifest Upload: Dropdown menu with 'Direct to UK Mail' selected.
- STL Service: Dropdown menu with 'Use STL 3rd class service' selected.

At the bottom right of the form area is a 'Reset Page' button. At the bottom left of the window is a 'Support' button, and at the bottom right is a 'Close' button.

Account File: Select an existing UK Mail account using the Dropdown list. Upon selecting an account, the options within that account will be displayed below.

Create New Account: This button will save the details in the boxes below, to a new account saved in the PARAMS folder.

Delete Existing Account File: Delete the account file that is currently selected in the Account File drop-down menu.

Account Name: Name of the account.

Account Number (mandatory): Seven character account number as supplied by UK Mail.

Mailing ID: Mailing ID code can be set here to a default value to be used for all jobs. If left blank, then the system will use the Mailing Reference field from the Job Parameters screen, or if that is also blank, then the system will use the Job name.

Cell ID: Cell ID code can be set here to a default value to be used for all jobs. If left blank, then the system will use the Cell Reference field from the Job Parameters screen.

Display/Edit UK Mail Account File Before Sortation: With this option checked; when you start the sortation process, the UK Mail account file is displayed on screen for editing. This is useful if any of the options in the UK Mail file need changing or if you wish to check any of the options that the UK Mail options screen does not display.

Associated SCID: This field is set to “No Associated SCID” by default, and you should only set this if you intend to use Mailmark on this Account, in which case UK Mail will tell you which SCID is associated with the account. You can only associate one SCID with the account, so when you define a UK Mail Mailmark job, choosing the UK Mail Account Number effectively selects the SCID for you.

DSA Account Type: This should be either NATIONAL only. ZONAL only or NATIONAL OR ZONAL if you plan to run both types of mailing on the same Account Number.

STL Service: This field determines how you want to process Standard Tariff bags. By default, you must set this to Use STL 3rd class service, and you can only use the 2nd class service by prior arrangement. When you use either of these options, then one or more bag records will be generated in the bag file that is sent to Consignor. There are two further options: Use STL 3rd class service but no Bag Labels needed (and the 2nd class equivalent). If you select one of these two options, then no bag records are written to the Consignor bag file, and you should enter the details manually into Consignor when you are ready (possible combining with other STL sections of other mailings).

Close: Automatically saves the current settings and returns to system Options.

Secured Mail

Mailers/Accounts

Secured Mail accounts are harder than most to setup, as they require more pieces of information in lots of places compared to most other mailers.

When setting up for a Secured Mail account for the SortIT Pro module, your Secured Mail account manager will need to be made aware that it will need to be a **BBS configured software set up** within this application.

The screenshot shows the 'sortIT - System Options' interface. The main content area is titled 'Secured Mail Mailers/Accounts'. It is divided into two main sections: 'Mailer Settings' and 'Account Settings'.
Mailer Settings: This section contains several input fields and buttons. The 'Poster Name' and 'Client Name' are both set to 'HelpIT Systems'. The 'Username' and 'Password' fields are masked with black boxes. The 'Type' is set to 'DSA'. The 'Contract Name' is 'Secured Mail'. Below these fields are buttons for 'Update Mailer', 'Create Mailer', and 'Delete Mailer'.
Account Settings: This section includes fields for 'Sub Client Name', 'Account Name', 'Account Type', 'UCID', and 'SCID'. The 'Account Name' is 'HelpIT Systems' and the 'Account Type' is 'National'. Below this is a table with columns for 'Sub Client Name', 'Account Name', 'Account Type', 'UCID', and 'SCID'. The table contains one row with 'HelpIT Systems' in the 'Account Name' column and 'National' in the 'Account Type' column. Below the table are input fields for 'Sub Client Name', 'UCID', 'Account Name', 'Associated SCID', and 'DSA Account Type'. The 'Associated SCID' dropdown is set to 'helpIT systems Ltd_testclient10100114 (80...'. Below these fields are buttons for 'Update Account', 'Create Account', and 'Delete Account'.
Navigation: On the left, there is a tree view with categories like 'General', 'Defaults', 'Reference files', 'Bag labels', 'Royal Mail', 'whistl', 'Citipost', 'UK Mail', 'Secured Mail', 'Mailmark', and 'Licence'. At the bottom, there are buttons for 'Support', 'Reset Page', and 'Close'.

Poster Name & Client Name: These details will have been set up for you by secured Mail, and can be found by logging into the DocketHUB site and checking your details.

Username & Password: These details are the same ones that you enter into DocketHUB to access your account.

Contract Type, CDA Account Number & Account Holders Name: These details should usually be kept as shown in the above image.

Once this information has been input, you will then have to click the button to “**Create Mailer**”, your account (which you set the details for underneath) will then be linked to this mailer.

Sub Client Name: This field should be kept blank unless you have specific instruction to include details in here.

Account Name: This is the name that the system will display in the list of secured mail accounts, as such it should be recognizable. In our example we set the name to HelpIT Systems

DSA Account Type: This option should normally be set to NATIONAL, and should only be set to ZONAL with prior agreement from secured mail.

UCID: This will be a six-character value provided to you by Secured Mail.

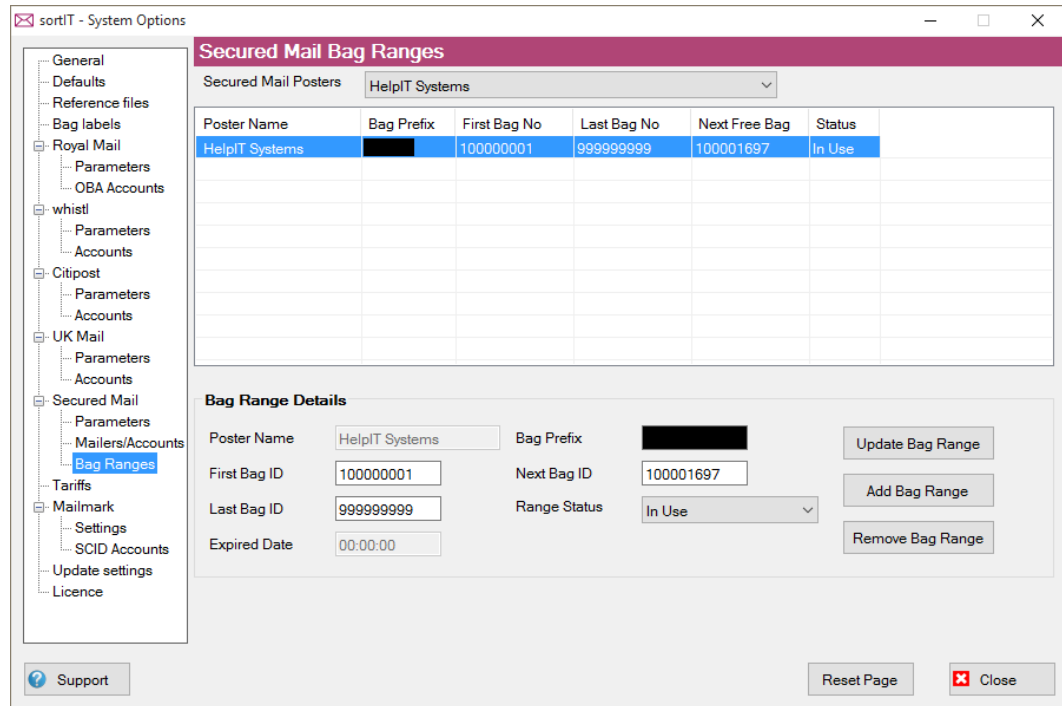
Associated SCID: This option is required in order to do Secured Mail Mailmark sortations. This list will be populated by the Secured Mail SCIDs that are registered with the account that you have placed within the Mailmark settings tab.

(if you do not have any Secured Mail SCIDs you will need to speak to your royal mail account manager about getting Secured Mail SCIDs.)

Bag Ranges

Once you have set up the Mailer you can then set up the Secured Mail Bag Ranges. This information will be used by the sortation module to generate Unique Bag Numbers for all Secured

Mail's Customers. The Details for your allotted bag range will have been sent to you by Secured Mail.



Secured Mail Posters: This drop down box will have all of the mailers that you have entered in the Mailers/Accounts page, and this drop down is used to differentiate the bag labels for the different mailers.

First Bag ID & Last Bag ID: These are nine digit numbers that have been provided to you to outline the number

Bag Prefix: The Bag Prefix is a 5-character alphanumeric code that will be found at the beginning of the Bag IDs

Next Bag ID: This number should be slightly higher than the First Bag ID or the Sortation won't execute correctly.

Range Status: This should be kept on available.

Once all of the information has been added press the "Add Bag Range" button to add the bag ranges to the Poster.

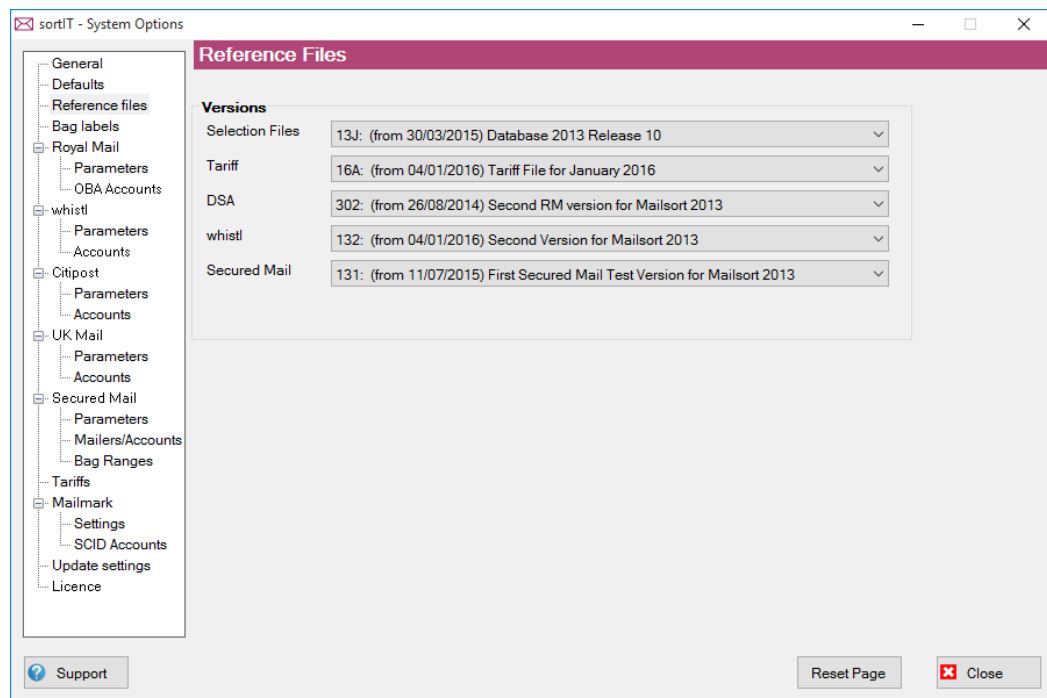
Until you have added a Bag Range to your Poster, you will be unable to run a Secured Mail Job.

Mailsort Database Management

Before performing a sortation, it is essential that both a Mailsort database and a price tariff are selected for use during the sortation. After selecting a Mailsort database and Mailsort tariff for the first time, you will not be required to re-select a database or tariff again until one of the current files expires (at which point you will be informed before the next sortation).

To select a Mailsort database or a Mailsort tariff, select Mail sortation, System Options, and then Configure System Options.

From here you can navigate to reference file in the navigation pane, and change the tariff and database files for both Sort&Save as well as the Mailsort versions for DSA, Whistl and Secured Mail.

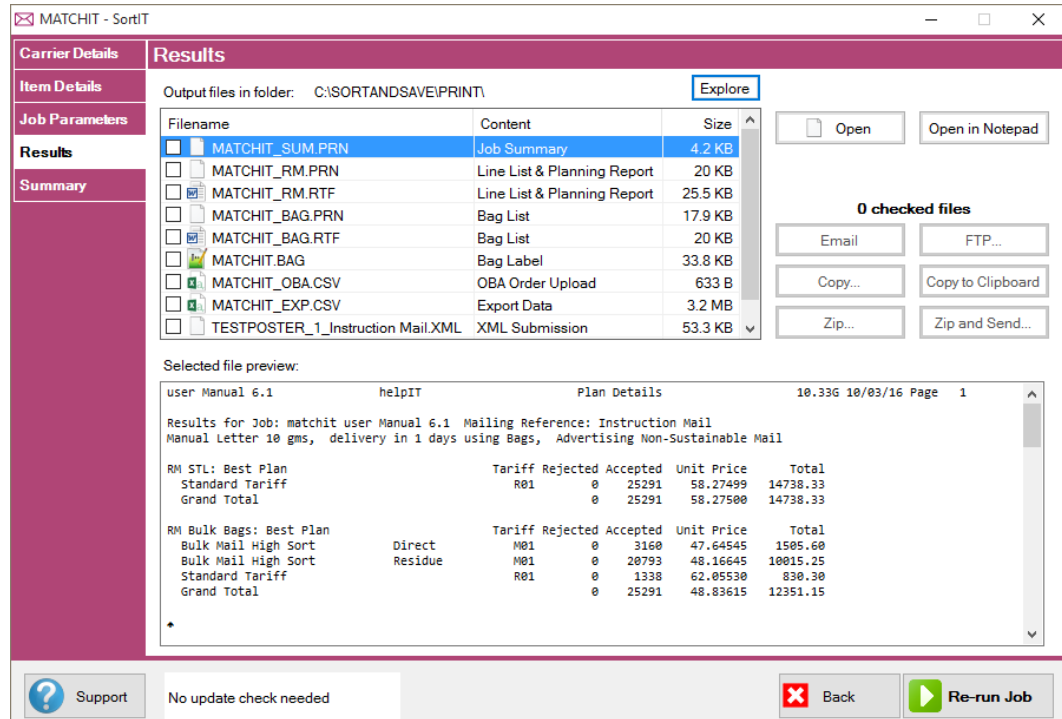


When a new Mailsort database or a new tariff becomes available, Sort&Save will notify you when you next open the program, and it will give you the option to update the software/tariffs

When sorting data close to a database or tariff changeover date, you may have some jobs that require sortation using the current database or tariff and other jobs that require sortation using the new database or tariff, so for a short period of time you may be required to frequently switch from one database or tariff to another.

Reports and Output

Once matchIT has finished sorting the addresses, a Results screen is displayed:



From here you can view the Mailsort reports and produce/print a Bag Label File.

At this point in the process the Mailsort report files are saved temporarily in C:\SORTANDSAVE\PRINT, however once the mailsortation is completed by pressing “Back”, these report files will be moved to a sub-folder, located in the same place as your processed files.

These reports can also be manipulated in this menu, by checking the files using the tick boxes on the left, you can send or copy selected files to other locations. (For more information in regards to these options refer to the BBS UserManual – Page 68, the manual can be found by default in "C:\SORTANDSAVE\SYSTEM" and is called USER10BBS.PDF)

Bag Label Files can also be produced from the Mailsort menu by selecting the “Bag Label” file. And then clicking “Print Bag Labels ▼” which will appear on the right, this will then give you options for printing the Bag label file.

Direct to Printer: this assumes that you have a Toshiba Tec BSX4 or BSX5 label printer attached directly, and that you want to print the labels now. When you use this option, the program runs immediately and produces and prints a file that can then be copied directly to the printer. The file name is jobname.BSX. The Sort & Save package waits until the file is printed.

Produce Print File: this assumes that you have a Toshiba Tec BSX4 or BSX5 label printer attached directly, and that you want to print the labels now. When you press the Print Bag Labels button, the BAGPRINT program will be started up as a separate activity and will print the labels whilst you can be doing something else.

Direct to A4: this option is useful for checking out the general layout of a file when you do not have a BSX5 printer attached, but do have a printer which is assumed to be capable of handling A4 sheets. This produces an approximation to the cardboard label on your currently selected printer, and it will print 5 test labels to each A4 sheet. These labels are NOT SUITABLE for use in a mailing, but can be useful to provide a quick check that everything looks OK. The main difference concerns fields that are printed vertically on label printers, which are printed on the area to the right of the A4 labels. This option runs the BAGPRINT program as a separate activity.

Produce PDF image of A4: this option can be invoked if you have installed a PDF Writer on your system. Instead of writing the information to a physical printer, it creates a PDF file. Some PDF Writers (such as Cute) ask you for the name of the output file, and you should give the output file the name of jobname.PDF. The Sort & Save package waits until the file is available and then invokes Acrobat Reader to show you its contents.

Run Interactively: this option runs the BAGPRINT program and allows you to select whichever option you want. You must use this option in the case where you are printing Bundle Labels when preparing unbagged mailings in cage sequence.

Summary

The screenshot shows the MATCHIT - SortIT software interface. The window title is "MATCHIT - SortIT". The main content area is titled "Summary of Job" and is divided into several sections:

- Carrier Details:** Summary of Job
- Item Details:** Name of job: matchit; Item weight: 10 grams
- Job Parameters:** Title for reports: user Manual 6.1; Service: First Class in Bags
- Results:** Mailing reference: Instruction Mail Cell Reports and Output; Type: Advertising Mail
- Results:** P/O no: SortIT Pro; Format: Manual, Letter
- Summary:** Collection: 09/03/2016

Below the summary, there is a "Results" section with a table showing the breakdown of mail services and their costs. The table is as follows:

Service	Level	No	Unit	Price
Bulk Mail High Sort	Direct	3160	47.645	1505.60
Bulk Mail High Sort	Residue	20793	48.166	10015.25
Standard Tariff		1338	62.055	830.30
Grand Total		25291	48.836	12351.15

To the right of the table, there is a "Postcodes" table:

Postcodes	No	%
Postcode	24022	94.98

At the bottom of the window, there is a status bar with the following elements:

- A "Support" button with a question mark icon.
- A message: "No update check needed".
- A "Back" button with a red 'X' icon.
- A "Re-run Job" button with a green play icon.

From here you can see the results of the mail sortation, as well as the parameters of the mail sortation. In this screen you can also see what percentage of your records have accurate DPS codes, as well as the overall price of the mailing on the set parameters. The page will automatically notify the user if the item details or parameters have been changed and whether you should re-run the job to update the reports and summary. You can use the Re-run Job button to re-run the job after making any changes if required.

Sortation Results

When a sortation is complete, after clicking on the Back button in the screen above, the Sortation Complete screen will appear. Here, you view the number of records sorted to each category (i.e. Direct Items, Residue Items, Standard Tariff Items or Foreign items). These categories will differ depending on the type of service used.

Counts		
Discounted Items:	0	(0.0% of sorted items)
Standard Tariff Items:	125	(100.0% of sorted items)
Foreign Items:	0	(0.0% of sorted items)
Total Items Sorted:	125	(100% of total records processed)

Reports

Reports Directory: [C:\PROGRAM FILES \(X86\)\MA...ORT\EXAMPLE1_SORTATION_REPORTS](C:\PROGRAM FILES (X86)\MA...ORT\EXAMPLE1_SORTATION_REPORTS)

Close

In the lower half of the screen, there is a link to a sub directory from where your database was processed to the reports that have been generated. This directory is hyperlinked and displays the path to the file (or a shortened version if the path is very long), which when clicked on will display the file on screen.

Sortation Data Fields

During the sortation process, several new fields containing information relating to the sortation and the status of each record are added to the main file. All fields are of character type. The key fields are as follows:

MS_ZONE: Indicates the nationality of non-UK records. For UK records, this field is left blank.

CARRIER: Contains the name of the downstream carrier that has been used. If Royal Mail has been selected to carry standard tariff items, then these items will have "Royal Mail" in their carrier field.

BBS_BAG_ID: Simple bag ID field, where the numeric value represents the bag number.

C_BAG_ID: Bag ID field containing all of the bag information that is required by the carrier.

SSC: Standard selection code field, where the length may be between 3 and 8 characters depending on the type of service used during the sortation. This field also contains start of bag indicators; "r:**".

BAR_CODE: Contains a generated bar code (only applicable when using CBC services).

BBS_CAT: Indicates the selection category that each record falls into (i.e. DIRECT, RESIDUE or STANDARD TARIFF).

BBS_ORDER: Contains ascending numeric values, indicating the files sortation order. This can be used to re-order the records if any other processes that may follow the sortation step order the file differently.

Computer Planning Report

user Manual 6.1 helpIT Postage Analysis 10.33G 14/03/16 Page 1

Selection Parameters

Mailing Reference Instruction Mail
 Purchase Order Number SortIT Pro
 Cell Reference Reports and Output
 Collection Date 14/03/2016
 OBA Account Name Test OBA Account
 OBA Account No 123456789

Bulk Mail High Sort
 Advertising Mail
 Non-Sustainable Mail
 Minimum Selection Size 50
 Mailing Class 1
 Format: Manual Letter
 Using Bags
 Selection Database 2013 Release 10
 with Tariff File Version 16A
 Using BBS Improvement Logic
 Minimum Selection Size for Service 50
 Minimum Direct Size Requested 50
 Minimum Residue Size Requested 1
 Minimum no. of Items for Service 1000
 Weight of Item (gms) 10g
 Max items in Bag (using Items limit) 750

Presortation Statistics

Address records processed 25291
 Postcodes matched 23944
 Postcodes tied up & matched 0
 Addresses matched to Residue 9
 Addresses matched to Foreign 0
 Addresses Not Matched 1338
 Number suitable for this service 23953

Postcode Statistics

Full postcode 23944 99.96%
 Outward postcode only 7 0.03%
 Postcode Level 23951 99.99%
 No Postcode 2 0.01%

Sortation Statistics

	Number	Items	% match	Bags
Direct Selections	51	3160	13.19%	51
Residue Selections	86	20793	86.81%	88
Totals	137	23953	100.00%	139

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Costs & Discounts

Number of Bulk Mail Items 23953
 Straight-line Direct cost(pence) 47,74074
 Straight-line Residue cost(pence) 48,26278
 Straight-line Total Direct cost 1508.61
 Straight-line Total Residue cost 10035.28
 Bulk Mail Discounted Cost 11543.89 481.94 per 1000 items

Postage Analysis:

	Total Items	Total Cost	Unit Cost	% of Items	% of Cost	Tariff
Direct Selections	3160	1508.61	47.74074	12.49%	12.19%	M01 AUX
Residue Selections	20793	10035.28	48.26278	87.51%	87.81%	M01 AUX
Standard Tariff	1338	830.30	62.05500	5.29%	6.71%	R01 STL
Total	25291	12374.19				

Analysis by Zone

Zone	Items	Percent Found	Percent in NGPP	Variance
A	11254	44.50%	34.36%	29.51%
B	7803	30.85%	30.69%	0.56%
C	2096	8.29%	20.31%	-59.19%
D	2791	11.04%	14.65%	-24.67%
E	1347	5.33%	0.00%	
All	25291			

Please check carefully that the tables used are suitable for this mailing

This is a Royal Mail standard summary report of the Mailsort, including postcoding levels, direct and residue selection statistics and the value of the discount obtained. Royal Mail refer to it as the Computer Planning Report. The costs shown on the report are not used by Royal Mail, but are presented for the mailer's information.

Line Listings

```

MATCHIT_SMAILPDF-Reader
user Manual 6.1      helpIT      Bulk Mail High Sort      10.33G 14/03/16 Page 1
Bulk Mail High Sort Job: matchit user Manual 6.1 Mailing Reference: Instruction Mail
Manual Letter 10 gms, delivery in 1 days using Bags, Advertising Non-Sustainable Mail

<----- Items -----><---- Bags ---->
Carrier Code  This  First  Last  This  Cum Bag Label
DIRECT 31955 71 1 71 1 1 FRETON CHRISTIAN RD PRO-PR2,PR11 C78
DIRECT 32074 54 72 125 1 2 BLACKBURN BB1 C78
DIRECT 32075 51 126 176 1 3 BLACKBURN BB1,BB6 C78
DIRECT 32520 50 177 226 1 4 ST HELENS WALL C76
DIRECT 32651 50 227 276 1 5 LIVERPOOL 4-5 L4-L5 C76
DIRECT 32968 85 277 361 1 6 JARROW NE31-NE32,NE35-NE36 E69
DIRECT 32988 75 362 436 1 7 VALLEY NE9 E69
DIRECT 32990 52 437 488 1 8 WASHINGTON NE37-NE38 E69
DIRECT 33012 51 489 539 1 9 HARTLEPOOL TS24,TS27 E69
DIRECT 33013 52 540 591 1 10 HARTLEPOOL TS25 E69
DIRECT 33446 54 592 645 1 11 GARPORTH LS25-LS26 E68
DIRECT 33467 52 646 697 1 12 SEACROFT LS9 E68
DIRECT 33476 55 698 752 1 13 WAKEFIELD WF3 E68
DIRECT 33479 58 753 810 1 14 WAKEFIELD WF3,WF10 E68
DIRECT 33623 80 811 890 1 15 DONCASTER DISTEN DN1,DN3,DN6-DN12,DN55 E67
DIRECT 33628 53 891 943 1 16 GAINSBOROUGH DN21 E67
DIRECT 34053 73 944 1016 1 17 LE DISTEN LE1,2 4-5,6-8,9 1 ETC L59
DIRECT 34292 62 1017 1078 1 18 WELLSBOROUGH NN9-NN9,NN29 L59
DIRECT 34317 74 1079 1152 1 19 COVENTRY CV6 L59
DIRECT 34322 60 1153 1212 1 20 LEAMINGTON SPA CV31-CV33 L59
DIRECT 34439 60 1213 1272 1 21 BIRMINGHAM B6-7,46,49-50,80 ETC L58
DIRECT 34442 52 1273 1324 1 22 CASTLE BROMWICH B35-B36 L58
DIRECT 34451 68 1325 1392 1 23 GREAT BARR B42-B43 L58
DIRECT 34456 53 1393 1445 1 24 KING NORWON B30,B38 L58
DIRECT 34460 53 1446 1498 1 25 MOSELEY B14,B47 L58
DIRECT 34476 51 1499 1549 1 26 SUTTON COLDFIELD B72-B76 L58
DIRECT 34479 69 1550 1618 1 27 WEST BROMWICH B70-B71 L58
DIRECT 34503 52 1619 1670 1 28 HEREFORD HR1-HR4 L58
DIRECT 34508 59 1671 1729 1 29 WORCESTER CITY WR1-WR3,WR7B,WR99 L58
DIRECT 34602 72 1730 1801 1 30 BILTON W14 L57
DIRECT 34610 86 1802 1887 1 31 KIDDERMINSTER DT10-DT12,DT14 L57
DIRECT 34619 83 1888 1970 1 32 WALSALL WS3-WS5 L57
DIRECT 34621 121 1971 2091 1 33 WOLVERHAMPTON WV1-WV4,WV7,WV13 L57
DIRECT 34623 83 2092 2154 1 34 WOLVERHAMPTON WV9-WV10 L57
DIRECT 34624 95 2155 2249 1 35 WOLVERHAMPTON WV11-WV12 L57
DIRECT 34625 78 2250 2327 1 36 WS,WV DISTEN WS6,WS8,WV5 L57
DIRECT 34736 56 2328 2383 1 37 BIRLEIGH ST6 L57
DIRECT 34737 50 2384 2433 1 38 HANLEY ST1-ST2 L57
DIRECT 34740 56 2434 2489 1 39 LONGTON ST3,ST11 L57
DIRECT 35850 50 2490 2539 1 40 WALTHAM CROSS EN7,EN9,EN77 B38
    
```

SortIT displays a combined Direct and Residue line listing. These are listings of all the places that the Direct/Residue Selection bags are going to, together with the number of items and number of bags.

Combined CPR & LL

By default, SortIT is set to create the line list and Computer planning report in a single file, this places the line list above on the same document as the CPR.

If you wish to have separate documents for Line list and CPR, then you can change this setting in the Parameters for each carrier.

Bag Labeling

In sortIT 6.1, you have far more options for bag label generation.

By default, when you Mailsort your mail in sortIT 6.1, a bag label file will be generated. This bag label file will be produced in an extended format by default, however this can be changed to “native format” should a native format be required by your mailer.

Extended Bag Label Format

We recommend that, for normal use, you should always produce the labels in Extended Bag Label format, because this has several advantages:

It is a more flexible format that allows for additional items to be printed on the label, such as Item Sequence Number, Number of Items, Bag Number and Weight. It also produces header, trailer and separator labels, to tell mailroom staff when the run switches from one carrier to another.

The entire set of labels for a complete job can be printed in one run, even when several carriers are involved.

If you are using several carriers depending on the client's requirements, then a single bag label printer (and computer) could be used in all cases, and one program will handle all the formats needed.

If you always use Extended Bag Label format, then there is no need to hold the Royal Mail and DSA reference tables on the bag label printing computer, because all the information is encoded in the BAG file.


Native Format

Sometimes however you may require the native format, to be used when outputting bag labels. This might be because you have a special system in place, or a third party handles all of your bag labels, requiring them to be provided in standard format.

In this case you are still able to print and generate bag labels, standard to the formatting of the selected carrier.

Royal Mail

Bag labels or Customer Final Labelling (CFL) require just two fields, one for each SSC Code, specifying the SSC Code (standard Mailsort selection code) and the number of bags, in a CSV format, with each field surrounded by double quotes as shown below



```

cfl.txt
"31955", "1"
"32071", "1"
"32074", "1"
"32075", "1"
"32651", "1"
"32968", "1"
"32988", "1"
"32990", "1"
"33012", "1"
"33013", "1"
"33446", "1"
"33467", "1"
"33476", "1"
"33479", "1"
"33502", "1"
"33623", "1"
"33628", "1"
"33938", "1"
"34053", "1"
"34292", "1"
"34317", "1"
"34322", "1"

```

In order to use this file to produce customer final labels, you must have a label printer specifically designed to accept this type of label file format. If you are unsure about this, please contact your Royal Mail account manager, who should be able to advise further.

Whistl

The native whistl layout has a line for each bag, and each line has a number of fields separated via a TAB character, e.g.

TEST0QAYA00005/43451/TEST/M///JOBNAME

where the TAB character has been replaced by / to make it visible.

9998805PC00001	996	9998	N	M	AA	Informational	B
9998805PC00002	996	9998	N	M	AA	Informational	B
9998805PC00003	996	9998	N	M	AA	Informational	B
9998805PC00004	996	9998	N	M	AA	Informational	B
9998805PC00005	996	9998	N	M	AA	Informational	B
9998805PC00006	996	9998	N	M	AA	Informational	B
9998805PC00007	996	9998	N	M	AA	Informational	B
9998805PC00008	996	9998	N	M	AA	Informational	B
9998805PC00009	996	9998	N	M	AA	Informational	B
9998805PC00010	996	9998	N	M	AA	Informational	B
9998805PC00011	996	9998	N	M	AA	Informational	B
9998805PC00012	996	9998	N	M	AA	Informational	B
9998805PC00013	996	9998	N	M	AA	Informational	B
9998805PC00014	996	9998	N	M	AA	Informational	B
9998805PC00015	996	9998	N	M	AA	Informational	B
9998805PC00016	996	9998	N	M	AA	Informational	B
9998805PC00017	996	9998	N	M	AA	Informational	B
9998805PC00018	996	9998	N	M	AA	Informational	B
9998805PC00019	996	9998	N	M	AA	Informational	B
9998805PC00020	996	9998	N	M	AA	Informational	B
9998805PC00021	996	9998	N	M	AA	Informational	B
9998805PC00022	996	9998	N	M	AA	Informational	B
9998805PC00023	996	9998	N	M	AA	Informational	B
9998805PC00024	996	9998	N	M	AA	Informational	B
9998805PC00025	996	9998	N	M	AA	Informational	B
9998805PC00026	996	9998	N	M	AA	Informational	B
9998805PC00027	996	9998	N	M	AA	Informational	B
9998805PC00028	996	9998	N	M	AA	Informational	B
9998805PC00029	996	9998	N	M	AA	Informational	B
9998805PC00030	996	9998	N	M	AA	Informational	B
9998805PC00031	996	9998	N	M	AA	Informational	B
9998805PC00032	996	9998	N	M	AA	Informational	B
9998805PC00033	999	9998	N	M	AA	Informational	B
9998805PC00034	999	9998	N	M	AA	Informational	B

Output Sorted Data

After sorting a file, the data can be output via the main Output Options screen. This screen can be accessed by selecting Output To File from the main Output tab.

Whilst setting the required output options in the main Output Options screen, it is essential that the Use Mailsort Options checkbox is checked. If this is not available, then it may be because the data has not been sorted, or because other processes that may compromise the sortation results

have been carried out on the data since the sortation. Regardless of the reason, in this scenario the sortation step will need to be carried out (again), and the Output Options screen re-opened.

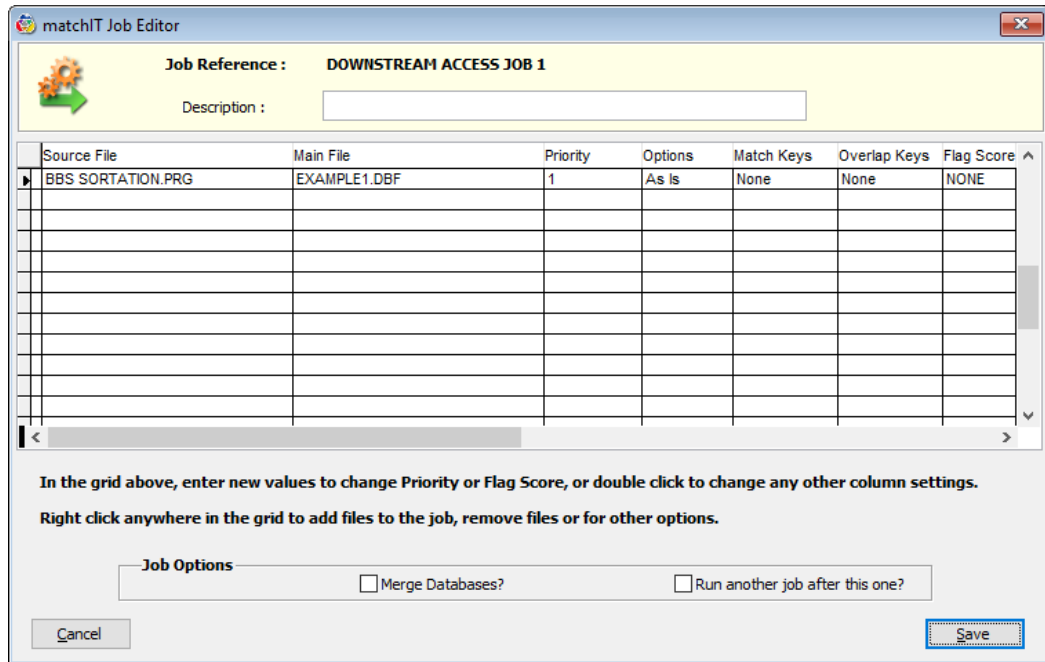
With the Use Mailsort Options checkbox checked, the Mailsort Options tab will be available and will provide access to all of the standard Mailsort output options (i.e. which selection type to include, whether to output to a single file or separate files for separate selection types, etc).

After setting the options in the Mailsort tab as required, and ensuring that the necessary fields are included in the output layout, click Generate Output to produce the output file. The output file will be in sorted order (i.e. the same order as the BBS_ORDER field in the main file).

Automation

It is possible to perform a Sortation from within an automated job script, using a pre-defined set of parameters. After a job has been set up, it can be run at any time and will require no manual intervention – it will run from start to finish, sorting data and producing the corresponding reports using the parameters specified during the initial set up.

To begin setting up a new job, the parameters for the job must first be set. This can be done by selecting Mail Sortation Options > Sort Data, and then setting the options as required for the job, and clicking Save Changes. After saving the required settings, close matchIT and copy the BBS_Parms.dbf (located in the BBSSort sub-folder of the matchIT root directory) to a new folder specific to the automated job. Now, start matchIT and select Automation, then create a new job by clicking on New Job from the Job Maintenance dialog. From within the job editor, select the program file “Downstream Access Sortation.prg” (located in matchIT’s Progs folder) as the source file in a new row, select the table that is to be sorted, as the main file, set Match Keys and Overlap Keys to None, and type “None” in the Flag Score cell, as pictured below:



Once the script has reached the stage pictured above, double click on the “BBS SORTATION.prg” file mapping in the Source File cell and choose Edit Source File. The program will now open in a text editor window and directly below the descriptive text at the top of the program is the following line of code:

```
Restore_File= ""
```

Between the double quotes, insert the path of the file that you copied BBS_Parms.dbf into previously, then close the text editor and when prompted, choose to save the program.

The script is now ready to run and can be run via the Job Maintenance menu whenever necessary.

If data import or any other common processes are also required as part of the script, then they should be set up prior to the Downstream Access Sortation step. For output, a similar step to the above Downstream Access Sortation step should be used, but with a different program; "Output.prg" (also located in matchIT's Progs folder). helpIT systems can provide a more general "Getting Started With Job Scripts" document for info on other scripted processes and how to set them up.

Error Levels

The Sort & Save program returns an ErrorLevel to the DOS Batch command processor, which can then be tested within the command file. The ErrorLevels that the system produces are listed below. Note that error levels 11, 13, 16 and 51 are no longer used, and that 88 has been added:

- 0 - if the program fails with an unexpected error (such as divide by zero).
 - 10 to 19 - if the program identifies a problem at start up time, before running your job.
 - 20 to 39 - if the program identifies a problem with your command line e.g. a non-existent JOB file
 - 40 to 69 - if you manually intervene to abandon the job during execution, or the job failed to run.
 - 100 or higher - if everything was OK.
- Specific error levels that can occur are:
- Specific error levels that can occur are:
- 0 : Serious error in Sort & Save (The job didn't run to completion).
 - 10 : The MENGINE program component is unsuitable or missing.
 - 12 : The DECODER program component is unsuitable or missing.
 - 14 : The Current selected databases are invalid in some way.
 - 15 : The Current selected databases are inconsistent with each other in some way.
 - 17: The password has expired or is invalid.
 - 18: System initialisation failure.
 - 19: Failure to load the current Tariff file.
 - 20 : The Job file does not exist.
 - 21 : One of the Import definitions does not exist, or is faulty.
 - 22 : One of the Export definitions does not exist, or is faulty.
 - 23 : One of the Data files does not exist, or is faulty.
 - 24: One of the Data files does not match its Import Definition.
 - 25: No Carrier has been selected.
 - 26: Too many Carriers have been selected (only one allowed for Mailmark jobs)
 - 27: No Carrier Account has been selected.
 - 28: Problem with the SCID specified.
 - 29: Problem with the Collection Date or Handover Date.
 - 40 : You manually interrupted and abandoned the job.
 - BV10 255 of 276 12/10/2015
 - 50: Error while processing the job (e.g. lack of memory or disc, or some records not processed).
 - 51: Problem initializing one of the Carriers
 - 52: Mailmark problem: job has already been uploaded.
 - 53: Couldn't allocate a whistl Mailing Segment.
 - 54: Couldn't allocate a whistl Unique Bag ID.
 - 55: Couldn't allocate Secured Mail Bag ID.
 - 56: Checksum problem with Secured Mail Bag IDs.

57: Invalid Secured Mail UCID.

62: Problem installing update.

88: Unknown type of error.

100 : Successful run.

[note that errors 11, 13, and 16 from version 9 do not apply to version 10]

Mailmark Controller

From the Mailsort tab, use this to launch the Mailmark Controller application (see Mailmark Controller Application section for more information).

Mailmark Controller Application

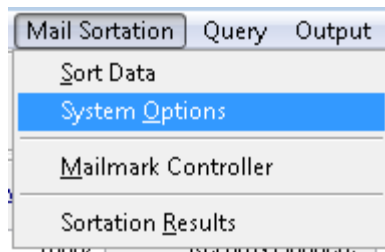
The Mailmark controller application is used for transmitting information about Mailmark sortations directly to The Mailmark handler. The application can be launched from the **Mailmark controller** option in the Mail sortation menu.

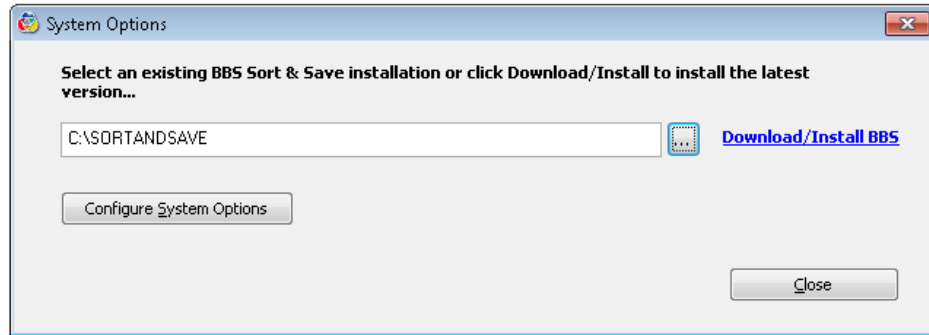
As well as transmitting new information to the Mailmark Handler, this application displays live information relating to manifests that are open or have recently expired.

Login

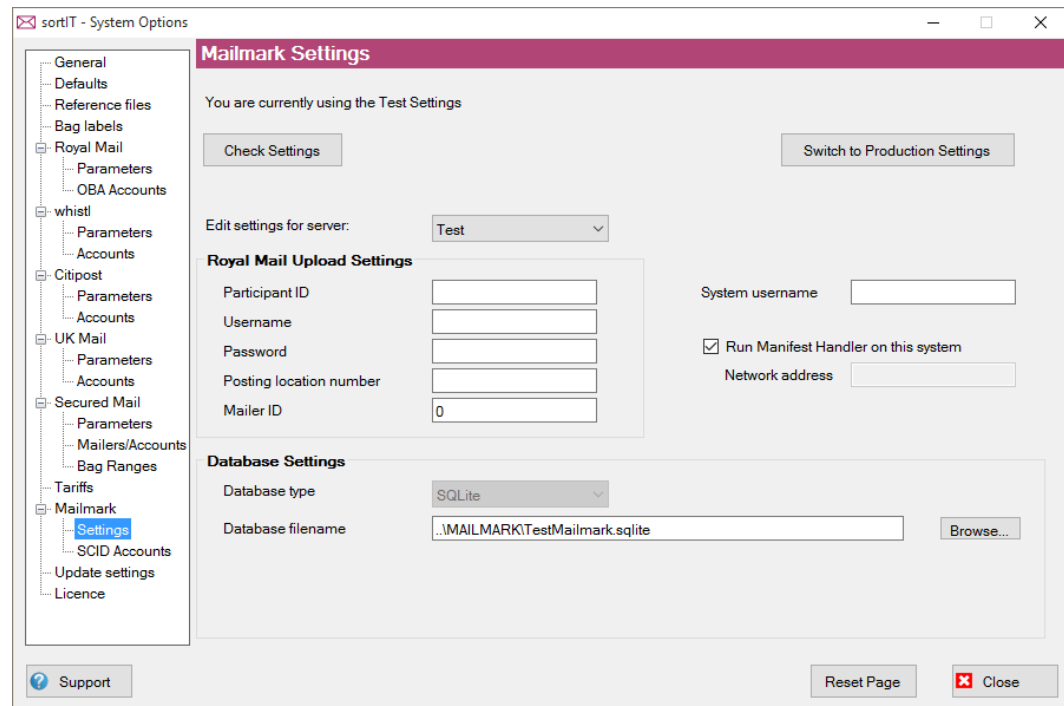
Royal Mail

Before the Mailmark Controller Application can be run and before you can perform any Mailmark sortations, you must first enter your eManifest login details supplied to you by Royal Mail into the System Options. To access the System Options click on the Mail Sortation main menu and then click on Configure System Options





Once the System Options screen is displayed, click on Mailmark > Settings and complete the details in the bullet points below

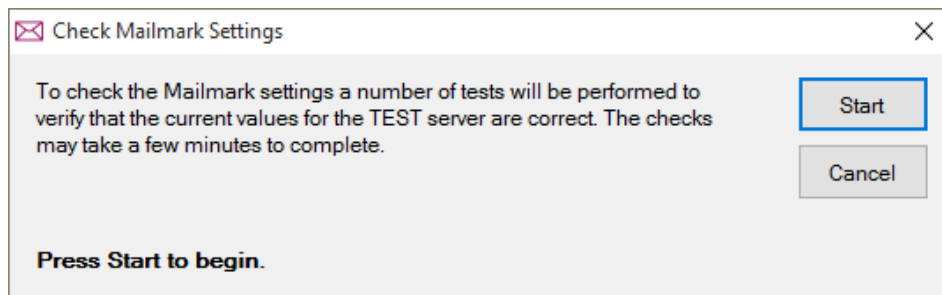


- **Edit Settings for server** – This refers to the two Mailmark Upload Environments, Test and Production, by switching between these you can change the login details for the different environments. This however does not change which environment you will be sending manifests too.
- **Switch to Production/Test Settings** – This option changes whether you will be sending your manifests to in the Mailmark Controller
- **Participant ID** – Enter your Participant ID as supplied by Royal Mail
- **Username** – Enter the eManifest user name as supplied by Royal Mail.
- **Password** – Enter the eManifest password as supplied by Royal Mail.
- **Posting location number** – This is the 10-digit number that you will require for OBA mailings (should you not have an OBA number, inputting 9000000000 can be used instead)
- **Mailer ID** - Normally you should leave it as 0. Quoting from the Royal Mail spec: “The Mailer ID is the Mailing House ID (QMP Number) and is held as an attribute of the

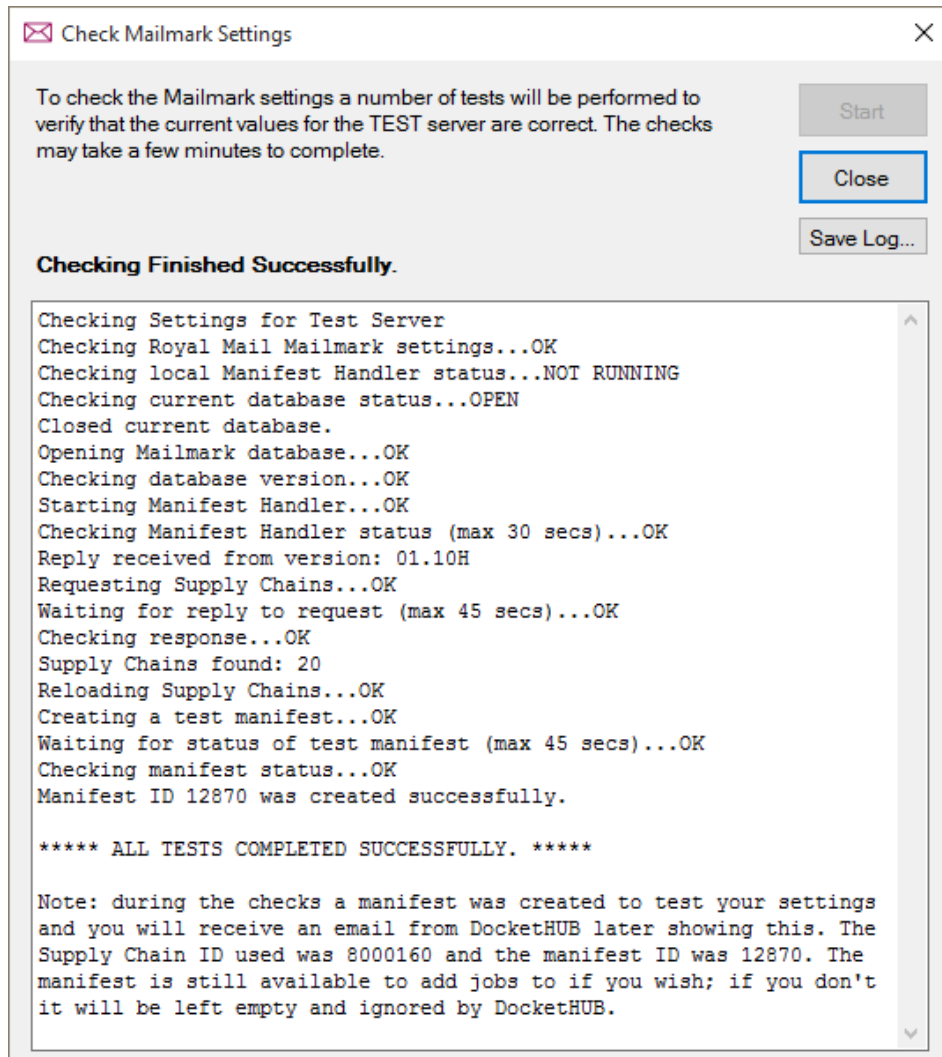
Posting Location but is only populated if the Posting Location is a Mailing House. A null value of 0 indicates that the customer account is the mailer.

- **Run Manifest Handler on this System** - You should check this box if you are the only user of the system. In the case of a multi-user system, check the box only if your computer is the one that is to control the uploading of manifests. Only one copy of the system should have this box checked.
- **Check Settings** - After entering the login details, click to attempt to connect to the Royal Mail eManifest web servers and proceed to the Manage Manifests screen.

When checking the Mailmark login details which you have entered, you will be presented with a box similar to the one below.



By pressing start, the system will check your login details against Royal Mails eManifest system. Showing a progress log, similar to the one below.

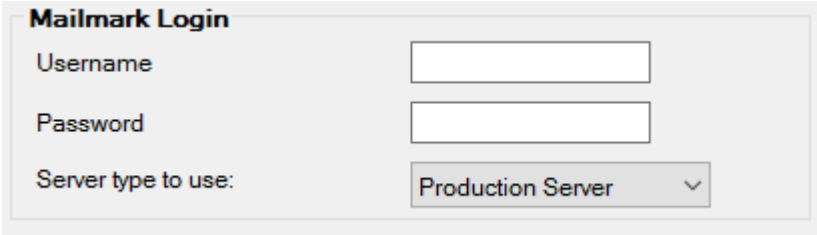
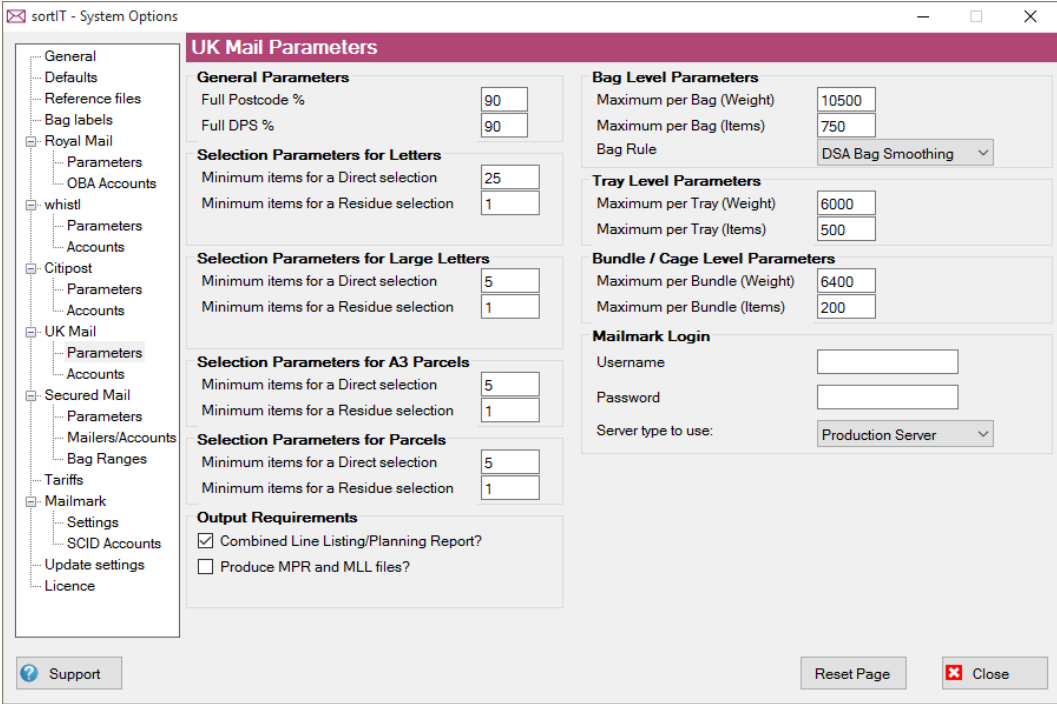


If you are struggling to connect to the eManifest system using your login credentials, looking through this log should be able to help you in identifying the issue.

If you are still having issue connecting to the eManifest system and require technical support, please send an email attaching this log using the “Save Log...” option, to our support department to help resolve the issue.

UK Mail

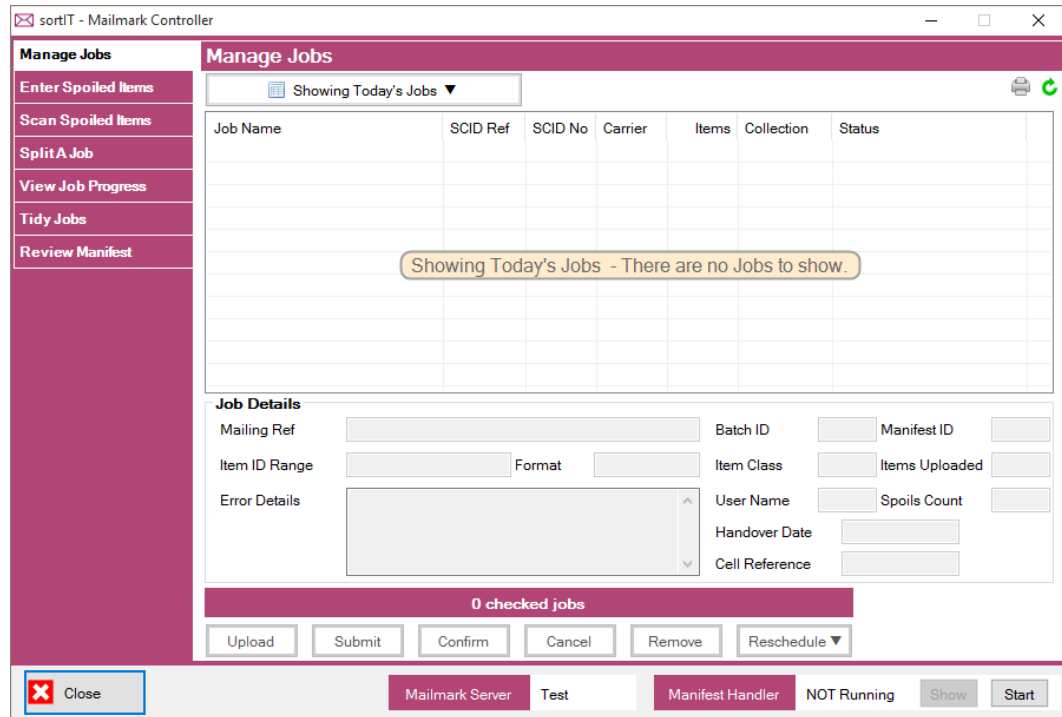
To login to the UK Mail eManifest system you will need to input your login details within the UK Mail parameters section.



You will need to place your UK Mail Mailmark login details that you have received from UK Mail. You will also need to make sure that the credentials that you have input match up to the server type that you want to use.

Mailmark Controller

The Mailmark controller enables you to view and edit the details of all of your manifests, both open and expired. As well as giving you the options to upload, submit and confirm your Mailmark jobs.



- **Manage Jobs** – The upper part of the Manage Jobs screen contains a group of fields representing the properties of a new Mailmark Job. These fields will be populated with the details from the Mailmark sortation. On the top of the screen you are given 8 options which allow you to change what jobs are shown.
- **Spoiled Items** – There are two tabs within the Mailmark controller for “Spoiled items”. These are items that you do not intend to mail and which you wish to remove from the eManifest.
 - **Enter Spoiled Items** – This tab should be used for individual spoiled items, and offers several different methods for identifying an item, or else for specifying a range of items, for example when the last part of the job cannot be fulfilled because there is an insufficient quantity of brochures available.
 - **Scan Spoiled Items** – here, you can use this tab to identify a set of spoiled items through their Mailmark barcode printed on them.
- **Split A Job** – This tab allows you to split your jobs either into a small number of pieces, to process each independently or split the job to process pieces at different dates because of fulfilment problems (or for a combination of both reasons).
- **View Job Progress** – Currently this tab in the Mailmark controller is a “Work in Progress”, but for now, if you have registered to view reports, and have a username and password, then you can click on the link to go to the royal mail website to the EIB Intelligent Barcodes section to see the progress of your job(s).

- **Tidy Jobs** – In this tab you can see all of the Mailmark jobs that you have done, and this screen gives you the option to “delete” them from the Mailmark controller. After you “delete” the job all details of the jobs are removed from the Mailmark database, although the standard output files like the Line Listing and Export files will remain on the system.
- **Review Manifest** – Here you can review the Batches that make up you Mailmark Job

Manage Jobs

The Manage Jobs screen enables you to view your Mailmark jobs, upload and submit them to the carriers’ handler, as well as confirm the manifest or reschedule the dates for the Job.

Job Name	SCID Ref	SCID No	Carrier	Items	Collection	Status
Not Collected yet						
<input type="checkbox"/> matchIT Citipost Job	helpIT systems Ltd...	8000164	Citipost	1999997	13/04/2016	Available for Upl...
<input type="checkbox"/> matchIT Job	helpIT systems Ltd...	8000163	Retail	25435	13/04/2016	Available for Upl...
<input type="checkbox"/> matchIT Whistl Job	helpIT systems Ltd...	8000160	whistl	25291	13/04/2016	Available for Upl...
Due for collection today Tuesday 12/04/2016						
<input type="checkbox"/> matchIT ScurMa	helpIT systems Ltd...	8000166	Secured Mail	24032	12/04/2016	Available for Upl...
Collected yesterday Monday 11/04/2016						
<input type="checkbox"/> matchIT UKMail Job	helpIT systems Ltd...	8000162	UK Mail	25435	11/04/2016	Available for Upl...

Job Details

Mailing Ref: matchIT Citipost Job Batch ID: 0 Manifest ID: 0

Item ID Range: 1 - 1999997 Format: Letter Item Class: 9 Items Uploaded: 0

Error Details: [Empty text area]

User Name: [Empty] Spoils Count: 0

Handover Date: 14/04/2016

Cell Reference: [Empty]

Buttons: Upload, Submit, Confirm, Cancel, Remove, Reschedule

Status Bar: Mailmark Server (Test), Manifest Handler (Running), Show, Stop

- **Job Details section** – This section provides information about the Mailmark Job that is being interacted with.
- **Confirm**– Click to confirm that the Job is final. Once a manifest has been confirmed, it can no longer be edited.
- **Mailmark Jobs grid** – This grid lists all of the jobs that are contained within the current Sortation option. Click on a job to select it. Once a job is selected, you can use the buttons below the grid to interact with it.
- **Reschedule Batch** – Click to open the Reschedule Mailing screen (see **Reschedule Mailing screen**) from which the selected job can be moved to a different date.
- **Cancel Batch** – Click to cancel the selected job. Once a job has been cancelled, it can no longer be edited.
- **Submit Batch** – Click to submit the selected job. Once a job has submitted, it is regarded as being in its final state, and cannot be edited or cancelled.
- **Upload** – Clicking this option will upload the job to the chosen carriers Mailmark manifest handler.

Enter Spoiled Items

This screen enables you to flag up some of the items within the job, because they are not going to be sent to your mail handler, and you want them to be removed from the Royal Mail eManifest.

The screenshot shows the 'Enter Spoiled Items' window in the Mailmark Controller. It features a sidebar on the left with navigation options: Manage Jobs, Enter Spoiled Items (selected), Scan Spoiled Items, Split A Job, View Job Progress, Tidy Jobs, and Review Manifest. The main area contains a table of jobs and a form for marking spoils.

Job Name	SCID Ref	Carrier	SCID	Items	Collection	Status
matchIT ScurMa	helpIT sys...	Secure...	8000166	24032	12/04/2016	Available for Upload
matchIT Citipost Job	helpIT sys...	Citipost	8000164	1999997	13/04/2016	Available for Upload
matchIT Job	helpIT sys...	Retail	8000163	25435	13/04/2016	Available for Upload
matchIT Whistl Job	helpIT sys...	whistl	8000160	25291	13/04/2016	Available for Upload

The form below the table includes fields for Job Name (matchIT ScurMa) and Mailing Ref (matchIT ScurMail Job). It also has a 'Mark spoils based on:' section with a dropdown set to 'Item ID' and radio buttons for 'Single ID' and 'Range of IDs' (selected). Below this are 'Start' (48209) and 'End' (72240) input fields, and buttons for 'Mark Spoils', 'Reset All Marked Spoils', and 'Process Marked Spoils'. A summary table shows the lowest and highest values for Item ID, Sequence No, Bag No, Carrier Bag No, and SSC.

	Lowest	Highest
Item ID	48209	72240
Sequence No	1	24032
Bag No	1	99
Carrier Bag No	315YS10000094	315YS100000192
SSC	30300	40400

At the bottom of the window, there is a status bar with a 'Close' button, 'Mailmark Server Test', 'Manifest Handler Running', and 'Show Stop' buttons.

- Mark Spoils Based on** - Before you can mark the spoils within the job, you need to decide how to find the items to spoil within the Job. This list box allows you to choose how you will be marking the spoils.

You are also provided the options to either mark the spoils in group, or singularly by either clicking “Range of IDs” or “Single ID”.
- Mark Spoils** - After entering a reference point for what to mark as a spoil, click to mark the record(s).
- Reset All Marked Spoils** – This option will remove any spoils marks from your sortation.
- Process Marked Spoils** - When you eventually Submit or Confirm the job, the system will apply all the spoils information as part of the Submit process. If, however, the job has already been uploaded, this button will become accessible. If you press this, then the spoils are communicated to Royal Mail straight away, even though you haven’t submitted the job. This is useful in case you forget to confirm it later, and it gets auto-confirmed by Royal Mail.

Split A Job

This screen enables you to select Mailmark Jobs that have been sorted under Royal Mail, and split the jobs into chunks.

The screenshot shows the 'Split A Job' window in the 'sortIT - Mailmark Controller' application. The window has a sidebar on the left with the following menu items: Manage Jobs, Enter Spoiled Items, Scan Spoiled Items, Split A Job (selected), View Job Progress, Tidy Jobs, and Review Manifest. The main area contains a table of jobs and a form for splitting a job.

Job Name	Start Job SN	End Job SN	Items	Collection	Status
matchIT Citipost Job	1	1999997	1999997	13/04/2016	<input type="checkbox"/> Available for Upload
matchIT Job	1	25435	25435	13/04/2016	<input type="checkbox"/> Available for Upload
matchIT ScurMa	1	24032	24032	12/04/2016	<input type="checkbox"/> Available for Upload
matchIT Whistl Job	1	25291	25291	13/04/2016	<input type="checkbox"/> Available for Upload

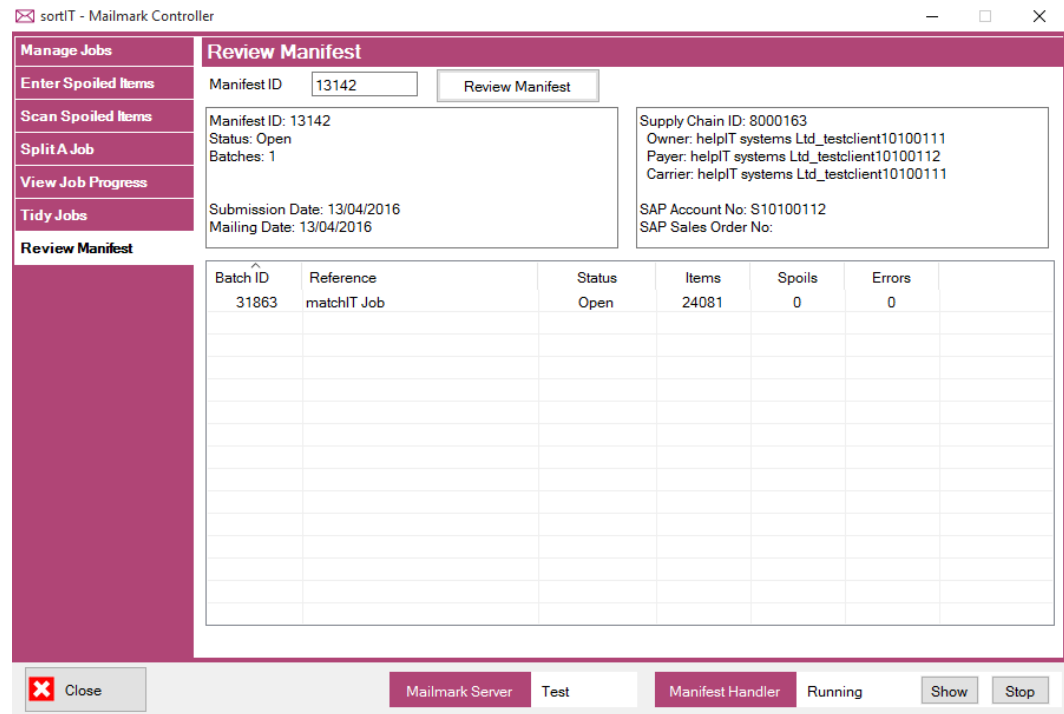
Below the table, there is a form for splitting a job. It includes fields for 'Job details for' and 'Reference'. The 'Split Job based on:' section has a 'Type' dropdown set to 'Item Sequence Number'. There are 'Start' and 'End' dropdowns for 'Identify the first item to be split'. A 'Split Job' button is present, along with a checked 'Increase Date?' checkbox. The 'Revised Collection Date' is set to '12/04/2016' and the 'Revised Handover Date' is empty. At the bottom, there is a status bar with 'Mailmark Server Test' and 'Manifest Handler Running' indicators, and 'Show' and 'Stop' buttons.

- **Split Job Based on** – Similarly so entering spoiled items, you have a drop down box which allows you to choose what to base a split on. This better helps you to split based on options such as number of letters, or tariffs.
- **Split Job** – After deciding how to split the job, and inputting the relevant information in the input boxes, you then press “Split Job”
- **Revised Collection Date** – If you want, you can also change the collection date for the part of the job that you have split off. This allows you to

Review Manifest

This tab allows you to enter a Manifest number from the manage Jobs screen, which then allows you to see the Batches within.

If you wish to check a manifest quickly without having to memorise the manifest ID, you can select the Job in the **Manage Jobs** tab, and that Jobs manifest ID (assuming the Job has been uploaded and received a manifest ID) will be pre-placed into the box at the top of the page.



This facility reports on the manifest from Royal Mail’s perspective. You can see more details of the job by clicking on the Printer icon of the Manage Jobs tab, and you can get a Job Report and/or a Manifest Report.

Uploading and Confirming a Manifest

In order to send the Job to your desired mailer you need to upload, submit and then confirm the Job manifests within the Mailmark Controller

The first step in the process is to upload the manifest; At this stage, the data is stored in the eMHS database, but it is still possible to amend the data, either by entering details of spoiled items, or by cancelling the batch entirely, or by rescheduling the batch to a future date.

When you are sure that a batch is correct, then you tell SortIT to submit the batch. This communicates with the eMHS system to tell it that the Batch is now complete.

When all the batches for a manifest have been submitted, then you tell SortIT to Confirm the manifest. This process should be repeated for any other manifests that have been created for today.

UK Postcoding & Address Processing

Overview

This section is only applicable if you have the **addressIT** (GB API) module.

Postcoding and address enhancement is an optional extension to matchIT using the Royal Mail Postal Address File (PAF). It enables users to validate, correct and generate postcodes and correct addresses on data where this information is lacking or incorrect. This improves data quality and can improve Mailsort discounts. You can generate postcoding reports after this processing has been done to see exactly what addressIT has done with the data, and how successful it was at validating postcodes.

Addressing and Postcoding Options

Addressing and Postcoding Options

You can access the addressing and postcoding options either at the end of the Setup Wizard if you select the Use Postcode/Address Verification option, or via the Jobs/Setup > Options menu. In each case, select the Addressing tab. You will then see this window:

An explanation of each of the parameters on this screen follows:

Use Postal Address File Verification

If this parameter is switched OFF, no postcoding processing will be carried out during import. Switch it ON if you want to generate postcodes and/or PAF standard addresses on your data during import.

PAF Region

This determines the nationality of the PAF data that you will use for processing. At present only UK data is available.

Thread Count

If your computer has multiple cores, then using multiple threads will increase the speed of the address processing stage. By default this is set to 2.

Address cleansing type

Address cleansing type

There are four types of address cleansing that can be carried out. These are as follows:

Full Address + Non PAF Elements

addressIT will verify and correct addresses and postcodes, retaining additional elements not on PAF e.g. customer preferred elements. Note: retaining additional elements may result in poor address quality, so please inspect address changes following processing. This address cleansing type is the recommended setting for business data processing, as it will enable business addresses to retain e.g. floor and room numbers.

Full Address Cleaning

addressIT will verify and correct addresses and postcodes, but will not retain additional address elements that are not on PAF. This setting is the minimum requirement for adding DataPlus information to your data. It is also the recommended setting for residential data processing.

Postcode Correction

addressIT will verify and correct postcodes, but will not update addresses to those held on PAF. This means that the postcode will be corrected if it is wrong due to human error or has become out of date due to Royal Mail recoding postcodes in that area.

Add DPS Only (no data correction)

addressIT will add DPS codes for verified records, but will not update addresses to those held on PAF. This option is ideal for appending DPS codes for use in mail sortation services that required DPS codes but where you do not want to change the input data.

Choose Address Field Structure

Overwrite Existing Address

This option will force matchIT to overwrite existing address lines with PAF standard address lines. It will prevent the ability to inspect address changes when the process is complete, however it will also reduce the size of your matchIT DBF file for when processing very large files.

Create New Address Lines

This option will result in your original address lines being kept, and any new address information being added in addition. This will ultimately enable you to inspect changes after processing and revert back to any original addresses if desired.

Address Update Threshold

This is used to select the success threshold level that a record must reach before any changes are made to its address. As well as being named, the different levels have been numbered from 1 to 5. 1 ('Verified Correct') is the most successful level a record can be at matching against a PAF record, as 5 ('Unmatched') is the least successful.

It is recommended that unless advised to do so by our support team, these threshold levels are left at their default settings as if set too high, only a very small hit rate will be obtained, just as if set too low, incorrect changes may be made due to inaccurate matches against the PAF file being accepted. An explanation of each of the different threshold levels can be found in the Online help.

Postcode Update Threshold

This option works in the same way as the Address Update Threshold, however it relates only to changes made to postcodes. This can be (and is by default) set to a slightly lower level than the Address Update Threshold. The reason for this being there is generally less of the address that needs to match a PAF file record in order to determine that addresses correct postcode.

Formatting and Additional Elements

Formatting and Additional Elements

This section provides several options for modifying the formatting of the successfully verified addresses and also for providing some additional data that may be found.

Add DPS

This will cause addressIT to add a delivery point suffix (DPS) code to any records that it can.

Ignore Company Names

When processing business addresses, company names will be completely ignored in order to raise the DPS hit rate as high as possible, this is not recommended if you are not adding DPS codes.

Add Address Key

This will cause addressIT to add the address key from the PAF file.

Format Post Town all capitals

This will cause addressIT to upper case the post town of any PAF successful record. Although this is no-longer postally required, it might still be your preferred format.

Add UDPRN

This will cause addressIT to add the UDPRN from the PAF file. (Please note that this is an additional addressing module and is not available in standard addressIT)

Add Multi Occupancy

This will cause addressIT to add the Multiple Occupancy Indicator from the PAF file. (Please note that this is an additional addressing module and is not available in standard addressIT)

Add Nothings/ Eastings Data

This will cause addressIT to add Northings and Eastings geo location data to any records that it can.

Add Ward Codes

This will cause addressIT to add ward code informational data to any records that it can.

Add Country Codes

This will cause addressIT to add country codes data to any records that it can, these include the following;

064 = England

152 = Northern Ireland

220 = Wales

044 = Channel Islands

179 = Scotland

128 = Isle of Man

Advanced Fuzzy Matching

Advanced Fuzzy works at a word level and allows names to be matched even if some words are missing (depending on how highly occurring the missing words are).

Address Processing Detail

Address Processing Detail

The Address Processing Detail dialog, accessed via the QA Dashboard or Import menu can be used to inspect the results of an addressing process. You can select different categories of records depending on the tab that is on display, and can then output the records falling into those categories by selecting one of the four output options at the bottom of the dialog (as pictured below), then clicking on 'Continue'...

The four different output methods are as follows:

Browse on Screen

This will display the records in the categories selected above in the form of a DBF table.

Output to File

This will output the records in the categories selected above, to a separate DBF file. If you then wish output these records to a different file format, only including specific fields, you should open the new DBF file in matchIT, and use 'Output To File' from the main Output menu.

Print to Report

This option will produce a report displaying the records falling into the selected categories as they were before and after address processing.

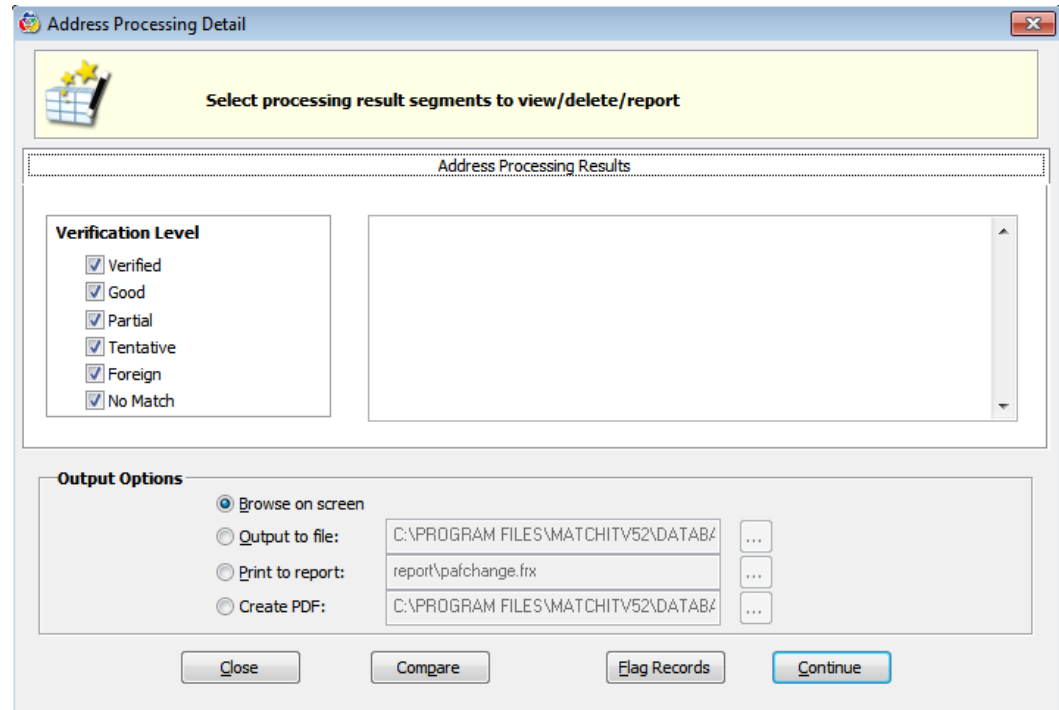
Create PDF

This will do the same as 'Print to Report', however the report will be sent to PDF as opposed to Print Preview on screen. Please Note: This option will only appear if you chose to install the matchIT PDF Printer, during the matchIT installation. You can also install the PDF printer after matchIT has been installed by using the PDFinstall.exe located in the Report folder of the matchIT directory.

Address Processing Results

Address Processing Results

From within the Address Processing Results tab, you can select records by the PAF success categories they fall into. The different categories are based around how well each record matches against a corresponding PAF record, if at all.



After selecting one or more addressIT success categories, you must select the method in which you would like to view the records falling into those categories. Apart from the various output methods listed previously, you can also produce the View Address Processing Changes dialog by clicking on 'Compare', or alternatively you can flag the selected records by clicking on 'Flag'.

The various success categories are as follows:

Verification Level

This allows you to select all of the records that are considered to have matched at specific verification levels:

Verified Correct

Records that were matched at premise or postcode level to the PAF database and for which a DPS code can be generated.

Good

Records that were matched at premise or postcode level to the PAF database and the majority of other PAF elements also matched to the PAF database.

Partial

Records that were matched at postcode level to the PAF database, but where a greater number of the other address elements were not able to be matched against the PAF database.

Tentative

Records that were matched at premise or postcode level to the PAF database, but where a significant proportion of the other address elements were not able to be matched against the PAF database.

Foreign

Records that cannot be classified as UK based, or contain address elements that refer to different locations around the world in relation to the country of origin.

No Matched

Records in this category were not able to be matched to any significant degree to the PAF address information without producing conflicts, ignoring significant address information or resulting in too many vague multiple matches.

Addressing and Postcoding Reporting

Addressing and Postcoding Reporting

Address Processing Summary

The Address Processing Summary report will become available from the Reports/QA Dashboard, when Address Processing is complete. The report provides general figures reflecting the number of records falling into each success category. These figures are also displayed in the form of a bar graph and a pie chart, to make general inspection easier to read and any problematic results easier to notice.

When the Address Processing Summary report is selected either via the QA Dashboard or the Import menu, you will be given the option to preview, print, send the report to text file or send the report to PDF.

To drill down through any of the records falling into any of the different success categories, please use **Address Processing Detail** dialog, accessed via the Import menu or the QA Dashboard.

suppressIT

Using suppressIT with One Mailing File

Importing Records

The easiest and safest way to use the **suppressIT** module is to use the Setup Wizard to set up any new job, as with the rest of matchIT Desktop. For instructions on how to use the Setup Wizard, please refer to the Getting Started Guide.

At the end of the Setup Wizard, you are presented with tick boxes to Create Match Keys, Create Mailsort Fields, Create Salutations, Correctly Case Data, Upper Case Post Town, Use Postcode/Address Verification, or Enable Automatic Suppression.

matchIT Setup Wizard - Processing Options

Matching Configuration:

Contact Business Address Matching Options

Create match keys?
 Create Mailsort fields? Sortation Type: Royal Mail Standard
 Use Postcode/Address Verification?
 Enable automatic suppression?
 Correctly case name and address?
 Upper case Post Town?

Generate Additional Fields More...

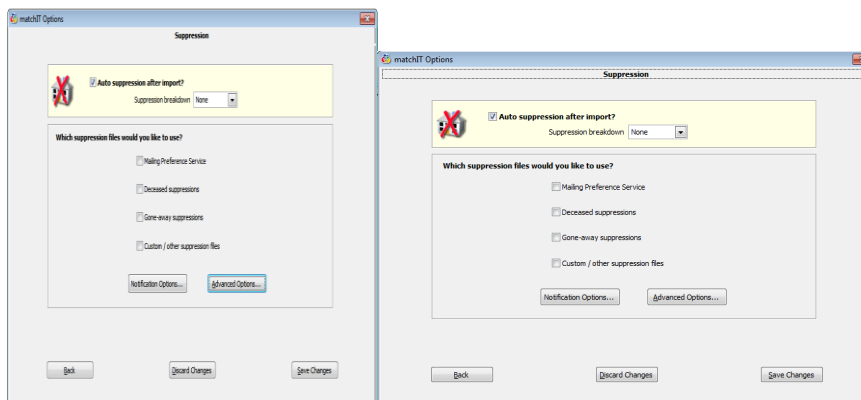
Import this file to :
C:\PROGRAM FILES\MATCHITV53\IMPORT\EXAMPLE1.DBF

Cancel Back Options Continue

Setting up Automatic Suppressions

Clicking the Options button will allow you to set the Suppression options (Suppression tab). From here you can select the suppression files you wish to use. To set the files, you need to tick the relevant box.

Alternatively, if you choose Find Suppressions from the Suppressions menu you will be presented with a similar screen. This should only be done after all internal duplicates have been removed from the file.



You can set the matching options and file locations for each file, by clicking the **Advanced** button.

As explained above, for initial installation, you need to check the Advanced Options, to ensure the correct files and matching options are being used. You only need to do this on initial implementation, unless you need to add more suppression files at a later date. For directions on setting up the Suppression files, see [Suppression File Locations](#).

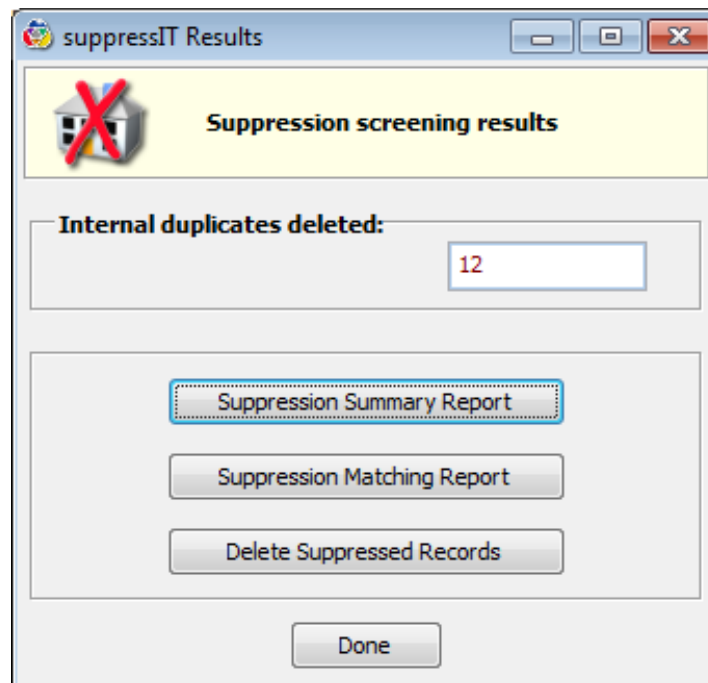
The Matching/Suppression Process

When you have set all the **suppressIT** options, you are now ready to import the data. You will see the only option available is **Continue** or **Find Matches**, depending upon if you selected the **More...** option. This will create the matchIT database for your source file, add matchIT's fields to this database, copy the records into this database, and then find the internal duplicates (within the source file). When it has found the internal matches, it will automatically find the suppression matches – dependent on what suppression files you have specified.

As stated above, if you check the **Enable auto-suppression** box & then **More...**, you will see the only option available will be **Find Matches**. If you don't want to import the file yet, or want to **Import Only** (e.g. if you don't want to use the default rules for finding matches, or you want to use a different level of matching for the suppression files), you should uncheck the **Enable auto-suppression** box to enable the other options as usual. You can then run Import and Find Matches from the menus or when prompted, and run the Suppression processing from the Suppression menu, or when prompted after Find Matches.

Suppression Results

When the Find Suppressions step has finished, matchIT displays the **suppressIT** Results. From this screen you can run the Suppression Summary Report and the Suppression Matching Report. You can also Remove Suppressed Records.



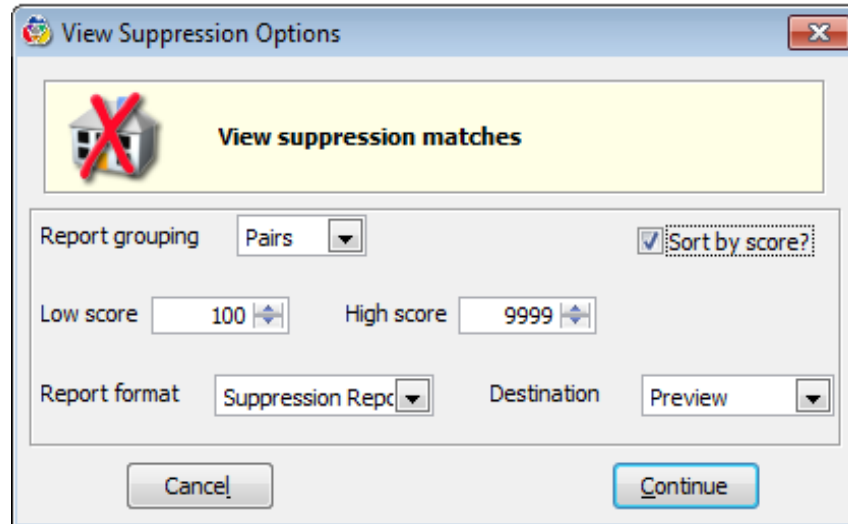
Suppression Summary Report

This report can either be run from the **suppressIT** Results screen or from the Suppression menu. This report summarizes the suppressions found in three ways.

- The Number of Potential Suppressions is the number of records on the Client Database that will be suppressed. Please note that this number will not necessarily tally with the totals in the other sections. One Client record could match with more than one suppression record, but would still only be counted as one potential suppression.
- The Suppressions Found by File section lists the total number of suppressions found in each suppression file. These figures represent the total number of Client records that had matches in each suppression file. One Client record with more than one match in a particular suppression file would be counted once for that suppression file.
- The Suppressions Found by Score Range section lists the total number of matches found in each Matching Score Range. These figures represent all of the matches found. So, if one Client record had two matches in one suppression file and one match in another suppression file, it would be counted three times in these figures. This section is useful for understanding the results you are getting at different Matching Score levels.

Suppression Matching Report

This report can either be run from the **suppressIT** Results screen or by choosing View Suppressions from the Suppression menu. If run from the **suppressIT** Results screen, the matches will be grouped in Sets and sorted by Score. If run from the menu, the View Suppressions Options screen will be displayed.



Report grouping

Matching records can be grouped in Pairs of one client record and one suppression or Sets where all suppression records matching the same client record are displayed together.

Sort by score

If this box is ticked the report will be sorted by matching score, otherwise it will be sorted by name.

Low score and High score

The range of matching scores for which the results are to be displayed. Only matches within this range will appear on the report.

Report format

The report format will default to Suppression Report. Alternatively, you can choose your own report layout from here.

Destination

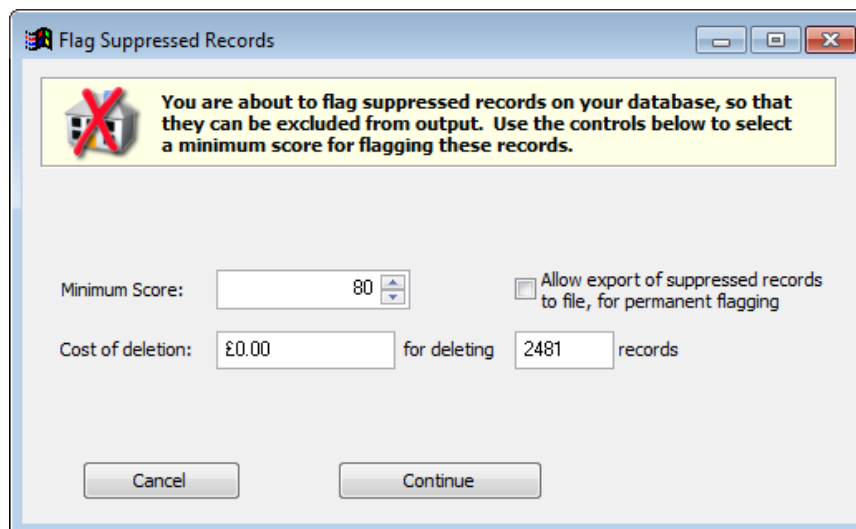
Preview for a print preview, Printer to print the report or File Preview to produce output to a file.

Continue

Click **Continue** to confirm your choices and create the report.

Delete Suppressed Records

This can either be run from the **suppressIT** Results screen or by choosing Remove Suppressions from the Suppression menu.



Minimum Score

Records with a matching score equal to or greater than this value will be flagged for exclusion from the output file.

Continue (accept cost)

This will remove all records meeting the Minimum Score above.

Warning: You will be charged as soon as this button has been pressed. This charge cannot be undone.

If you have the option Notify Suppression Hits By Email turned on, they are sent via an Internet connection to your supplier. If you don't have an internet connection available on the PC where you are running **suppressIT**, you will be asked to email a log file to your supplier.

Cancel

Cancel the deletion process. You will not be charged.

You can incrementally remove score ranges if you wish (starting at a high score and getting lower- obviously, the lower the score, the more records will be removed). You will only be charged for the new records removed each time. *Remove Suppressions* is incremental – you will not be charged twice for the suppression, unless you "undelete" the records. (**We strongly recommend that you do NOT undelete records**).

Also, we suggest that you flag your internal matches first – this way, some of the potentially suppressed records will be removed before you come to suppress them. Since they are already removed, you won't be charged for records that have been removed due to internal deduplication.

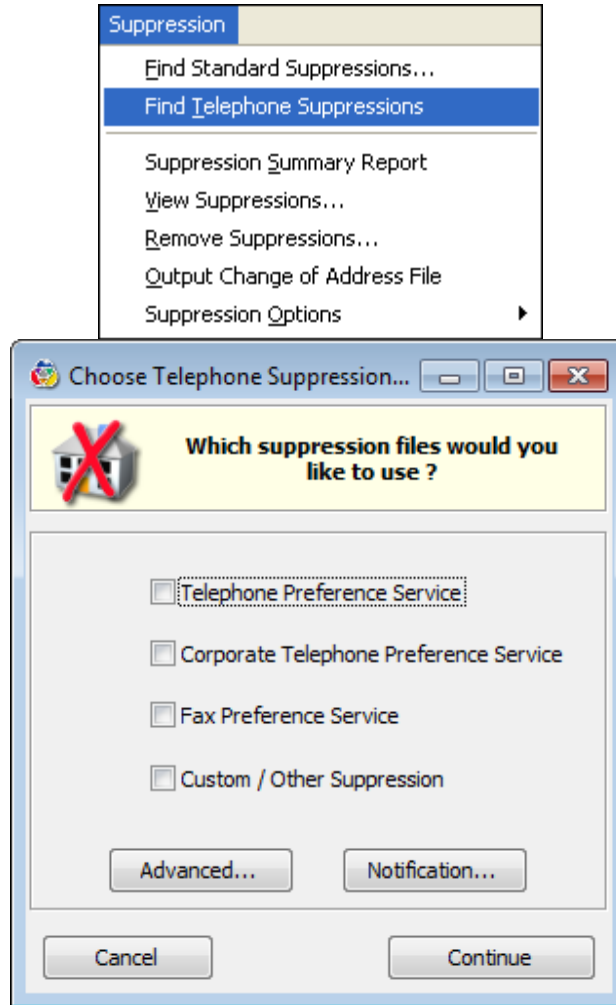
If you do not want to remove all the categories of suppressions that you have found, then you can switch categories off by using the Suppression Options screen (Choose Suppression Files) as illustrated earlier, before you remove the suppressions.

Once you have removed your suppressed records, you can continue using matchIT in the usual manner, for Mailsorting, outputting records, etc.

Telephone/Fax Suppression

As well as providing a way of suppressing your file against name and address suppression files, **suppressIT** also provides a facility for suppressing against lists of telephone or fax numbers.

In order to use this functionality, you must first import your data using the Setup Wizard, ensuring that your telephone or fax fields are labeled 'telephone' or 'fax'. Once you have finished importing your data, you can begin the telephone or fax suppression by selecting **Find Telephone Suppressions** from the main **Suppression** menu. This will produce the Choose Telephone Suppression Files dialog, as pictured below.



From within the Choose Telephone Suppression Files dialog, you can tick the suppression file(s) that you would like to suppress your data against. After making your selection, you can click on **Continue** to begin the suppression step. Before clicking on **Continue**, you should make sure that you have mapped **suppressIT** to the suppression files that you have chosen to use. To do this, click on **Advanced** to display the [Advanced Telephone Suppression Options](#) screen.

Advanced Telephone Suppression Options

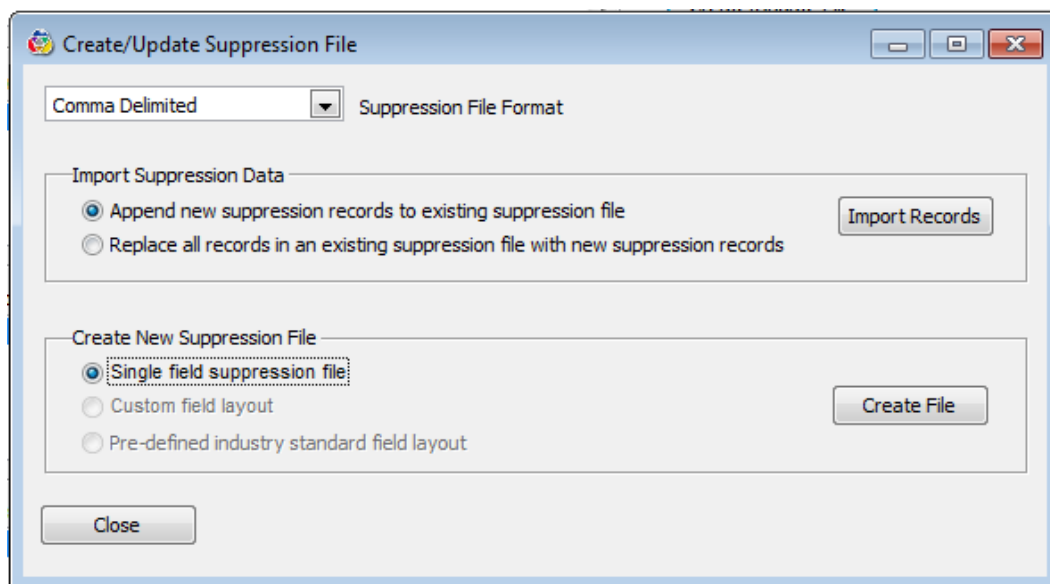
From within the Advanced Telephone Suppression Options screen, you are given the facilities to point to 'Add' suppression files available to your PC, no-longer point to 'Remove' suppression files that you no-longer wish to use, or ['Create/Update' suppression files](#). There are four different areas within this screen. Each area represents a different type of telephone suppression file. These four areas correspond to the four tick-boxes in the Choose Telephone Suppression Files dialog.

Create/Update Suppression Files

From within the Create/Update Suppression Files dialog you can choose to either import suppression data into an existing DBF file, or create a new suppression DBF from scratch. Before making this selection, you must specify the format of your input suppression data file by using the **Suppression File Format** drop-down menu at the top of the dialog.

If you already have an existing suppression DBF file, either select '**Append new suppression records to an existing suppression file**', to simply add to the data you already have, or choose '**Replace all records in an existing suppression file**' to overwrite the data you already have, with data from a new file. After checking the appropriate radio button, click on **Import Records** to begin importing the new data.

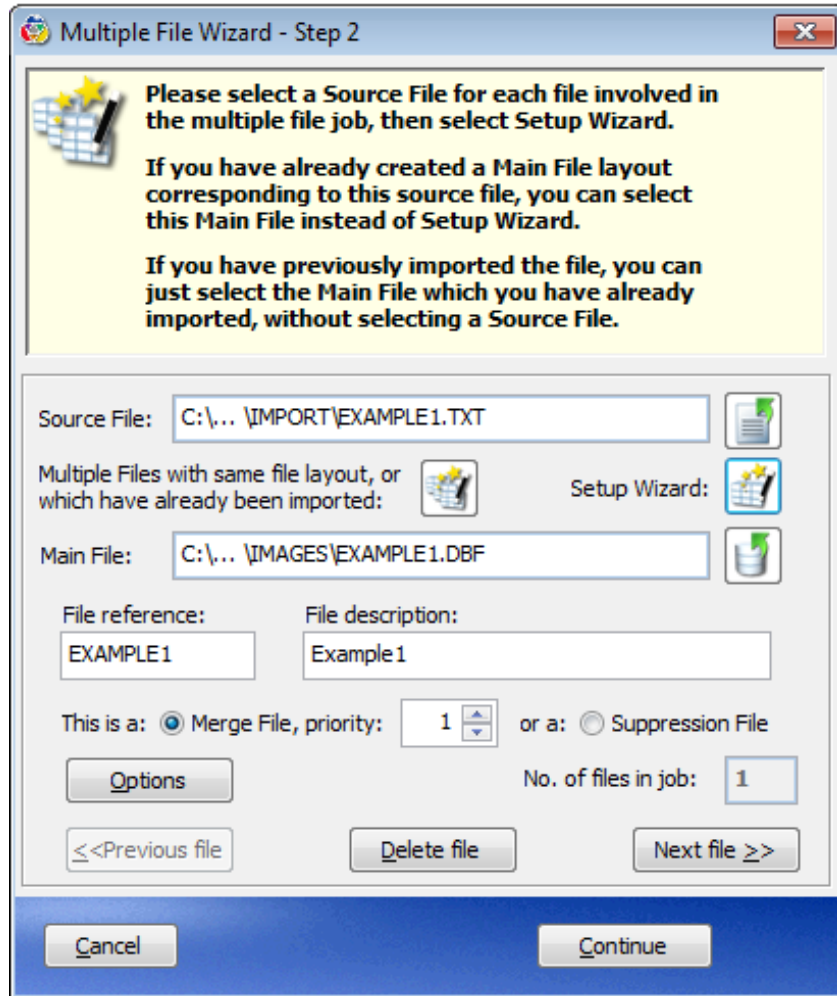
If you do not have a suppression file already set up, you can select '**Single field suppression file**' to create and populate a suppression file from a single list of telephone or fax numbers. Alternatively, if your input suppression data file contains multiple fields, select either '**Custom field layout**' to manually name each of the fields in your file, or select '**Pre-defined industry standard field layout**' and select one of a number of industry standard suppression file names, of which **suppressIT** is already familiar with the layout. After making your selection, click on **Create File** to begin the process.



Using suppressIT with the Multiple File Wizard

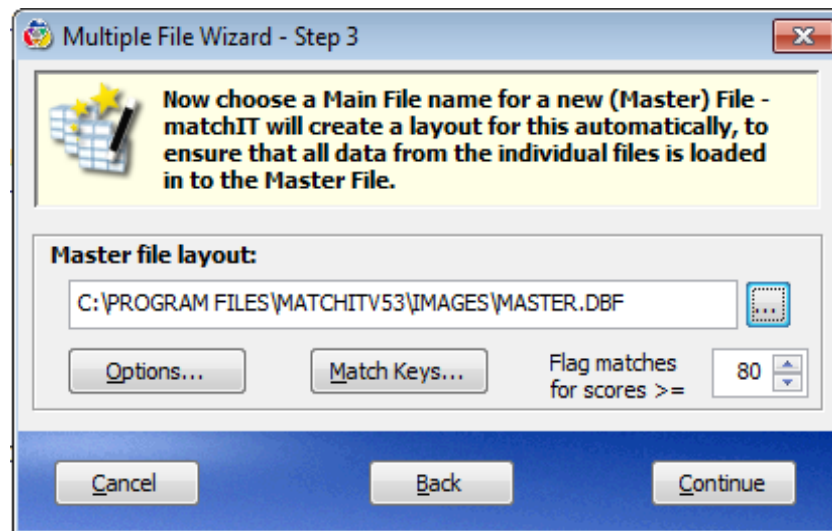
Setting up the Multiple File Job

Before you enter the Multiple File Wizard, please make sure that you have set up the locations of the suppression files that you want to use. Then set the files up for the Multiple File Wizard as usual.

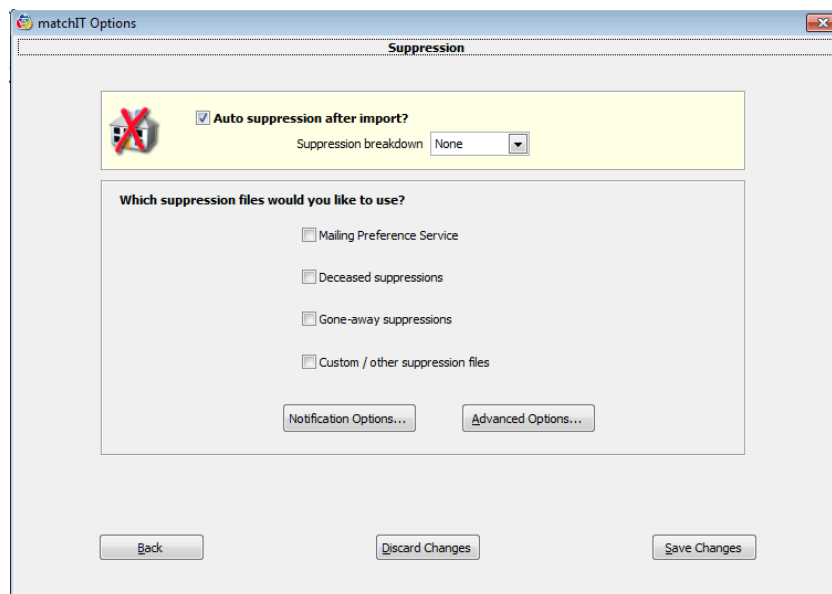


Do not select any of the standard external suppression files within this step – if you have any suppression files which are smaller than or comparable to the total mailing volume, then select them as suppression files here – otherwise, set them up as external suppression files, as described in the next section.

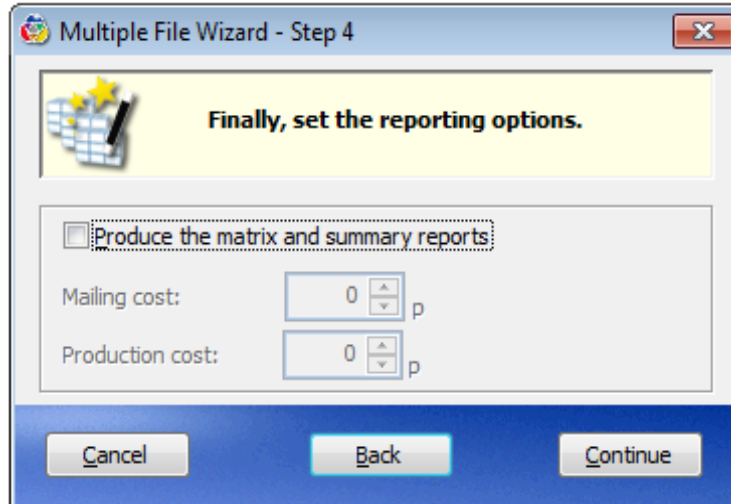
When you specify details of the Master File, select *Options*:



Then select the **Suppression Tab**, tick the box labelled **Automatic Suppression After Import**. Here you can also change the Suppression Options as usual.



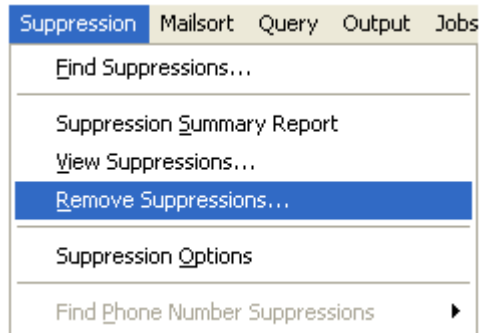
As the final stage in setting up the Multiple File job, **do NOT select to produce the matrix and summary reports**, as you must review and accept the suppression charges (and remove the suppressions) before the matrix report can be produced.



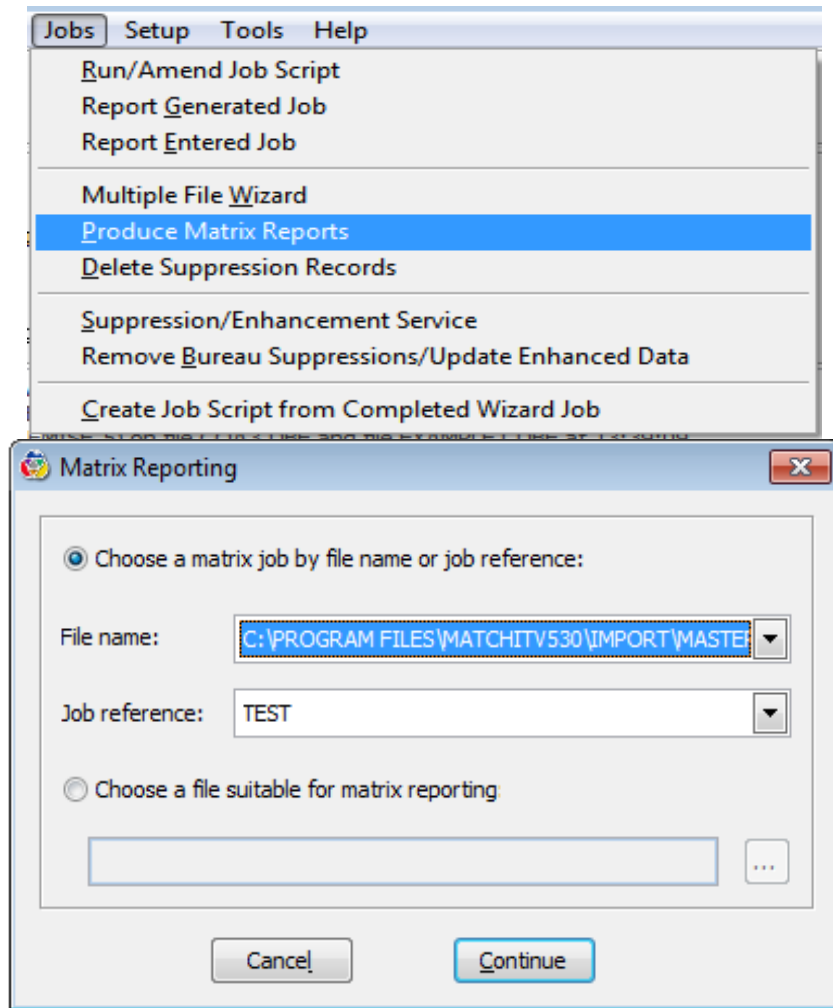
You can then run the job as usual.

Producing Multiple File Reports

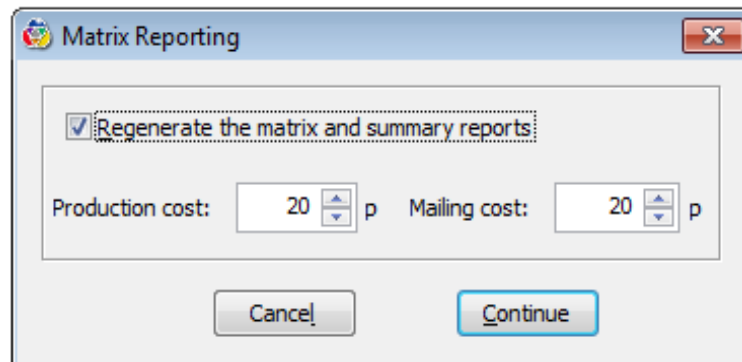
When the job has finished, select the **Suppression Summary Report** and then to **Remove Suppressions** from the **Suppression** menu.



Finally, select to Produce Matrix Reports from the Jobs menu and select the Job reference that you have just run.



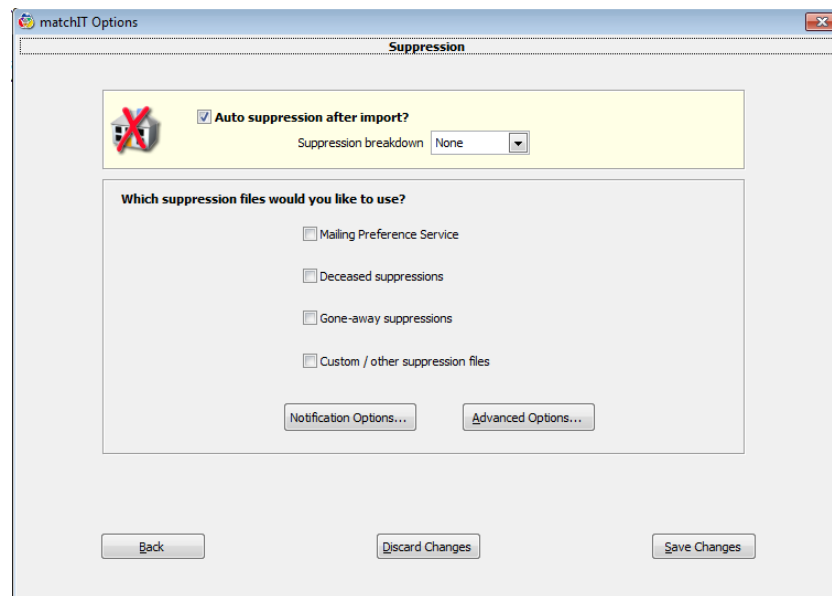
Select to Regenerate the report, enter the costs and the report will then be produced.



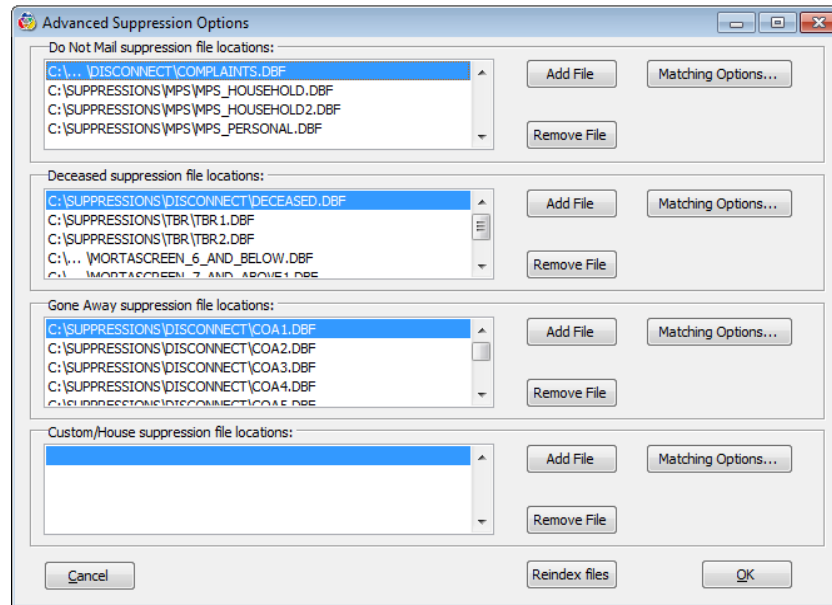
suppressIT Implementation

Suppression File Locations

Before you use **suppressIT** in matchIT, you must set matchIT up to point to the suppression files that you have imported or loaded from the supplied suppression CD. Unless your network is geared up for fast indexed I/O on very large files, we recommend that you place these into a folder on your local machine.



Now open matchIT, and choose **Suppression Options** from the Suppression menu and click on the Advanced button. This will take you into the **Advanced suppressIT Options** screen, which will allow you to set the locations of the suppression files. You can select a suppression file by clicking the **ADD** button.



You will need to **Add** each of your suppression files to this screen. Generic terms for the categories of suppression files are being used. These are provided for your convenience. If you put a file into the wrong category, matchIT will still process the file correctly, but your summary report will not reflect the right categorisation.

The **Remove** button allows you to remove it from the list, respectively.

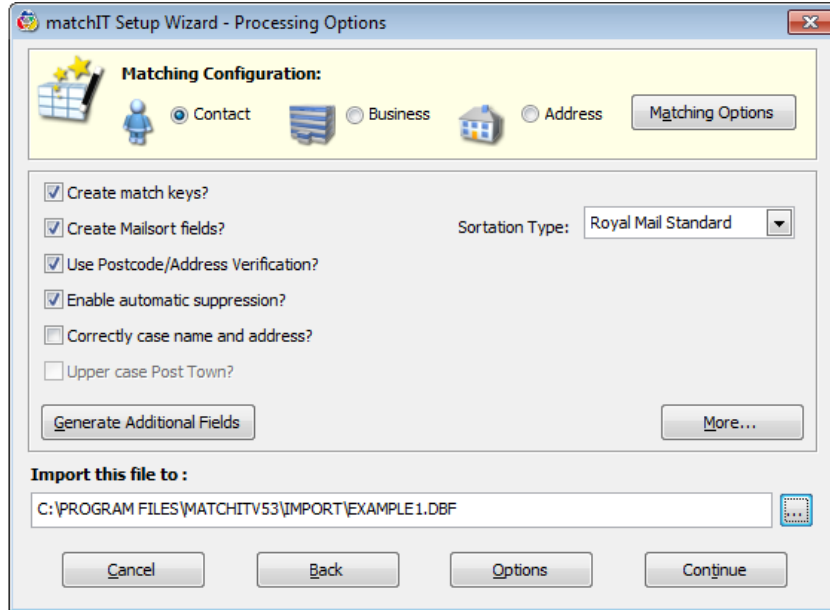
When you have added all your files, you must click on the Matching Options button for each file set, to set up the matching options that will be used when matchIT runs the suppressions for you.

TIP: After running a suppression if you don't want to use a certain file, remove it from the file locations, the report and the counts will change respectively as will the costs.

Selecting Matching Criteria

When you have set the files you wish to use, you need to set the Matching Options/Keys.

Clicking the Matching Options on each section displays the Suppression Matching Options dialog box.



For the standard MPS, Deceased and Gone Away suppression file locations, use the default keys as supplied unless you have a good understanding of the implications of different keys for run times and hit rates (see the Help or User Manual topic "Match Key – Definition". If you're not sure what match keys to use, please call us. The default keys that we supply with **suppressIT** are as follows:

- MPS (Mailing Preference Service) and TBR (The Bereavement Register)

LEFT(POSTCODE,8) + NAME1
 ADD_KEY + NAME1
 LEFT(POSTCODE,8) + LEFT(DPS,2)

- GAS - (Gone Away Suppressions)

ADD_KEY + NAME1
 LEFT(POSTCODE,8) + LEFT(DPS,2)

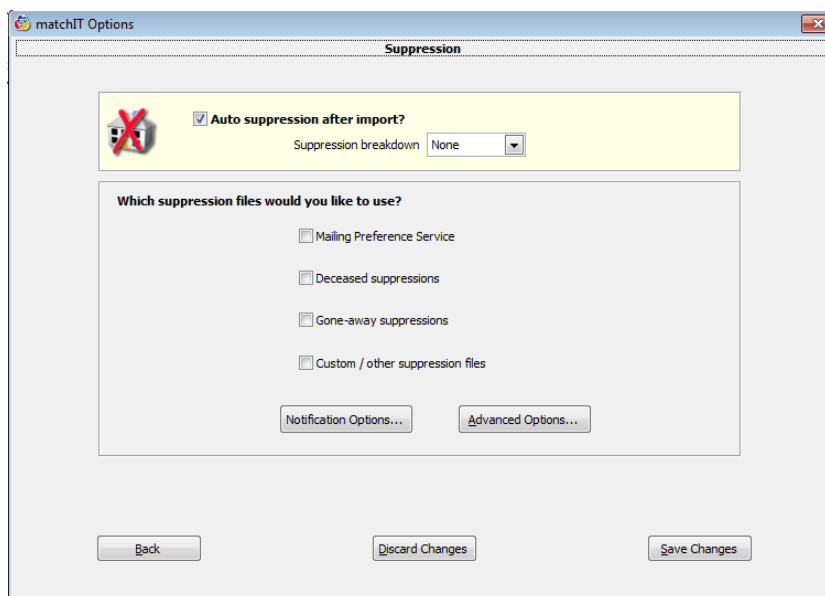
If you don't have Delivery Point Suffixes (DPS) in your mailing file, we suggest LEFT(POSTCODE,8)+UPPER(LEFT(ADDRESS1,4)) instead of the last key shown above, but this may miss some matches compared with using the DPS. You can allocate DPS codes to the mailing file on Import if you have the **addressIT** module. The suppression files provided with **suppressIT** already contain DPS codes.

You can also specify matching options here: the minimum score to report for each file, the matching level and options for what to do when premise numbers do not match. By default, **suppressIT** is set to match deceased files at individual level and MPS and gone away files at family level, with options set to insist that premise numbers match and do not match if one is empty.

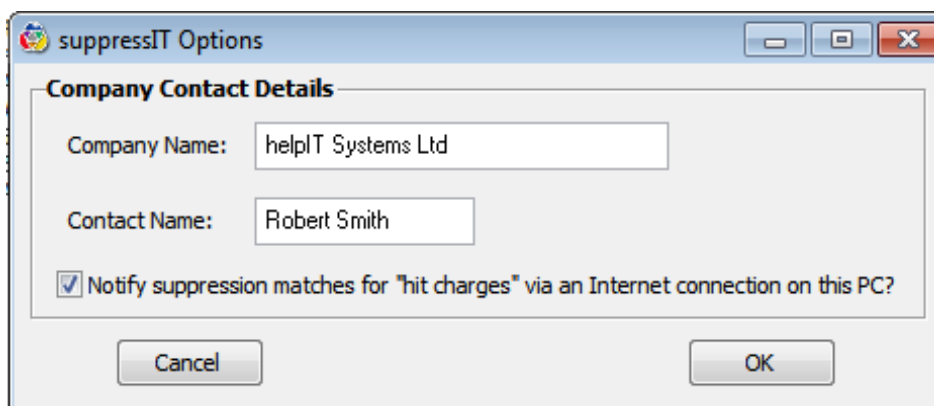
If you have updated the match keys for any of the files, please say Yes when matchIT prompts you to reindex the files, or choose Reindex Files from the **Advanced suppressIT Options** screen, otherwise every time you use **suppressIT** you will have a significant delay while it reindexes the suppression files that you are using.

Company Contact Details

The final part of **suppressIT** you will need to set up before you use it is the Company Contact Details. To access these, choose the **suppressIT Options** from the Suppression menu. You will see a screen like this:



Now, click on the **Notification Options** button, and you will see the Company Contact details screen below:



Make sure that the **Notify suppression hits by email** box is ticked (if it isn't, you won't be able to enter the contact information) and then fill in your company name and a contact name. Usually the contact name will be the person who most uses **suppressIT**.

Now click on OK twice, to return to the main menu.

Loading Custom Suppression Files

The first thing you will have to do is to get the suppression files that you want to use with *suppressIT*. Usually, these files will be provided in matchIT-compatible DBF files from your supplier. If they are, please skip to the next section, Suppression File Locations. If you are using suppression files not supplied by your supplier, please follow these instructions:

- If you received your data in a text file, this means that you will have to import it into matchIT as for any other file that you use with matchIT. If you use the Setup Wizard to specify the layout of the file, select to *Add* a field at the end of the layout and label it *S_ID* with a field width of 2 character.
- If you have already imported the file into matchIT, you will need to modify the structure of your suppression file (from the Jobs/Setup ... Main File Layout menu option), to add the *S_ID* field.
- You must then populate this field with a file identifier. This identifier must be the same for all records in your file, but does not have to be unique across other files.

To do this, you can go into matchIT's system commands (from the Tools menu), and type:

USE ? (followed by clicking on the Process Command button)

Now choose your suppression file.

Now type:

REPLACE ALL S_ID with "C"

or C1, C2 etc. if you have more than one custom file. The "C" must be upper-cased.

If an imported file will exceed 2GB after it has been imported into matchIT, you must split it into two or more smaller pieces, each imported into its own matchIT table. If you have multiple matchIT tables for the suppression file, each table that you split the file into should have the same *S_ID* value.

In terms of performance, it does not matter if you split a file into pieces or not, as the processing time will always be in proportion to the total number of records you are suppressing against.

Next, you must browse the SUPPCATS table in the matchIT directory (which you can do using the View Table option in matchIT's View menu) to add an entry for the code letter that you have used. The supplied table looks like this:

Code	Fullname	Category	Supplier	Priority	Cost	In_use	Totalcount	Totalcost	Perm_cost	Coa_avail	Hosted	Cust_param
C	House suppressions	House file	CLIENT	1	0	F	0	0	0	F	F	
U	House Telephone file	House Telephone file	CLIENT	1	0	F	0	0	0	F	F	
T	TPS	Telephone Preference	DMA	2	0	F	0	0	0	F	F	
M	MPS	Do Not Mail	DMA	2	0	F	0	0	0	F	F	T
F	FPS	Fax Preference	DMA	2	0	F	0	0	0	F	F	
W	CTPS	Corporate Telephone Preference	DMA	2	0	F	0	0	0	F	F	
M2	Baby MPS	Do Not Mail	DMA	2	0	F	0	0	0	F	F	
GN	NCOA Update	Gone Away	ROYAL MAIL	4	0	F	0	0	0	F	F	
GS	NCOA Suppress	Gone Away	ROYAL MAIL	4	0	F	0	0	0	F	F	
DN	NCOA Deceased	Deceased	ROYAL MAIL	4	0	F	0	0	0	F	F	
G2	Purity	Gone Away	ACXION	4	0	F	0	0	0	F	F	
G3	ESF	Gone Away	EXPERIAN	4	0	F	0	0	0	F	F	
D2	Mortascreen	Deceased	MILLENNIUM	4	21	F	0	0	0	58	F	
M1	disConnect Complaint	Do Not Mail	EQUIFAX	3	20	F	0	0	0	50	F	
D1	disConnect Deceased	Deceased	EQUIFAX	3	20	F	0	0	0	50	F	
G1	disConnect Gone Away	Gone Away	EQUIFAX	3	20	F	0	0	0	50	F	
B	TBR	Deceased	THE READ GROUP	5	20	F	0	0	0	60	F	
G	GAS	Gone Away	THE READ GROUP	5	20	F	0	0	0	60	F	
GC	reConnect	Gone Away	EQUIFAX	3	20	F	0	0	0	50	T	F

To Add a record, use the Table menu, Append New Record.

The Fullname field is the name that will appear on the reports.

The CODE field corresponds to entries in the S_ID field of your suppression tables. **NOTE: If you have S_ID values that are not present in this table, they will NOT appear in your reports!**

The PRIORITY field indicates the priority of the file. Lower values = higher priorities. Therefore, suppressions will be logged against priority one files in preference to priority two – and so on.

The CATEGORY field just gives some information about the content of the file for the user.

The COST field indicates the price of a suppression (in pence). *suppressIT* will always take the cheaper suppression record in preference to the more expensive one for equal priorities.

Unless you have specific requirements that are different, use the entry for the Mailing Preference Service as a model for your new entry.

Implementation Checklist

Finally, use the following checklist to ensure that you have done everything necessary:

- Imported (or copied) the suppression DBF tables.
- If they are Custom Suppression Files, they all have a fully populated one-character S_ID field and set up entries in the SUPPCATS pricing table for *suppressIT*
- Pointed *suppressIT* to each file location, via the *Advanced suppressIT Options* screen.
- Set up matching keys & options for each file classification on the screen.
- Provided company identification details.

If this has all been done and checked, then you are ready to use *suppressIT*.

Support for Additional Suppression Files

Suppression files, which typically contain several million records, should be loaded using automated job scripts. This provides the ability for files to be spilt where required, and prevents users from having to remember specific vital steps that are required when setting up a suppression file.

The 'support for additional suppression files' functionality is comprised of one master template job script (including the program set), and five copies of this script, which have been adjusted to cater for the following suppression files: Purity, ESF, Mortascreen and Baby MPS. The different copies of the master job script vary based on the structure of the suppression files they were created for, as well as the number of records contained in each suppression file.

When loading a suppression file using its dedicated script, the user will simply be required to edit the start of the first program script by adding the path, name of the source data file, and the format. The user can then start the script and leave it to run. The length of time it takes to complete is dependent on the size of the file and the performance specification of the PC that matchIT is running on.

When the suppression file load process finishes, the suppression files will be located in the same folder as the source data folder, and will be ready to use in matchIT.

Breakdown of Steps Taken by Job Scripts

The Suppression Load process is made up of three main stages. Each stage, and the corresponding row(s) displayed in the Job Editor screen are explained below.

For further in-depth details relating to any of the steps in the load process, please contact [helpIT systems](#).

- **Stage 1 – Split and Append Source Data (first row in the job script)**

Stage 1 is represented by the very first row in the job script. In this row, matchIT uses the SPLIT_SUPPRESSION program to identify the suppression source file (specified by the user), and then split the file into portions. The number of portions depends on the width of the file and number of records. The source data portions are then appended into 'load' tables.

- **Stage 2 – Generate Keys in the 'Load' tables (middle rows in the job script)**

Stage 2 is represented by the second row in the job editor, and further rows depending on how many files the suppression file has been split into. Each row generates keys in and address processes a suppression file portion contained within an intermediate suppression load file.

- **Stage 3 – Create Final Suppression Files (last row in the job script)**

Stage 3 is represented by the last row in the job script. In this row, matchIT creates the final suppression files in the same directory as the source data file. It creates the appropriate indexes for the file(s) and names them appropriately (suffixed with a number if there is more than one suppression table).

Before running a Suppression Load Job Script

1: Create a suppression load directory

The first thing to consider before using a suppression load script is the location of the suppression source data file. This is important, as all processing is carried out in this directory, so it must be a directory on a local drive with plenty of free disk space.

The name of the directory containing the suppression source data file is used by the programs in the script, to determine which suppression file is being loaded. This will ultimately determine which pre-defined 'master structure' file is used to load the data into. It is therefore essential that the directory be named correctly.

All pre-defined job script templates can be found in the "Suppression_Load" directory, which is in matchIT's "Progs" sub-folder. The sub-folders within "Progs\Suppression_Load\" reflect the suppression load directory names that the script would recognise (e.g. the suppression source data could be stored in "D:\Data\Suppressions\Purity" but not "D:\Data\Suppressions\Puritydata").

2: Specify the suppression source file details from within the job script

After creating the suppression load directory and copying the suppression source data file into it, the details of this file must be specified in the job script. To do this, select Automation from the main matchIT screen. From within the Job Maintenance dialog, select the corresponding job script using the 'Job Reference' drop-down and then click on 'Modify Job'. The job script will now be displayed in the Job Editor window.

The suppression source file details will now need to be specified in both programs featured in the script: SPLIT_SUPPRESSION.PRG and

CREATE_FINAL_SUPPRESSION_FILES.PRG. These can be edited in turn by double clicking on the program and choosing 'Edit Source File'. When each program is displayed on screen, modify the appropriate code at the beginning of the program.

In SPLIT_SUPPRESSION.PRG, the path and name of the source file, the format of the source file and a suppression file type value must be specified. The suppression file type determines the category of the suppression file that is being loaded. Please see [Suppression File Types](#) for further information.

The example below shows how the code might look after it has been edited:

```
lcInputFile = "D:\Suppression_Load\MyFile"
lcInputFormat = "DELIMITED WITH CHARACTER |"
lcSID = "C"
```

In this example, "lcInputFormat" (representing the format of the source file) has been set to expect PIPE delimited.

In CREATE_FINAL_SUPPRESSION_FILES.PRG, it is only the path and file name that must be specified.

Suppression File Types

The suppression file type, specified by **lcSID** in SPLIT_SUPPRESSION.PRG links the file to a record in SUPPCATS.DBF, located in the matchIT root folder. This can ultimately be used to determine the information displayed on suppressIT reports next to that suppression file - the priority the suppression file takes amongst other suppression files and the hit costs that may be involved in using a specific file.

If a file is simply to be referred to as a 'Custom Suppression File' with no hit charges, then the file type should be set to "C". Otherwise, it should be set to correspond with a new record in SUPPCATS.

SUPPCATS.DBF already caters for common types of suppression files. The existing records can be used as examples of how to add further categories if required.

Running a Suppression Load Job Script

If the steps detailed in the "[Before Running a Suppression Load Job Script](#)" section have been followed correctly, the script will be ready to run.

To run a Suppression Load script, select Automation from the main matchIT screen. When the Job Maintenance dialog appears, select the job script that is to be run, from the "Job Reference" drop-down menu and click on "Start Job". The script will start. Unless the current suppression load directory has never been used to load suppression files before, the script will run without user intervention until the suppression load process is complete.

Note: when loading suppression files containing several million records, the scripts are expected to run for several hours before completion.

Running a Suppression Load Job Script for the First Time

If the directory containing the suppression source data has never been used for suppression loading before, the script will create a "Load" sub-folder and will copy into it the required intermediate load tables.

After preparing the new load directory, the script will automatically update its paths and file mapping to the new suppression load directory, and the following message will appear:



Upon clicking 'OK', in order to recompile the script with the new file mappings, matchIT will close. At this point, restart matchIT and re-run the job script. It will now run until all suppression files have been loaded.

Using the Final Suppression Files

When the script has finished running, the final suppression tables will be ready to use.

These can be used just like any other suppression file in the suppressIT module; simply map the suppression file(s) in the Advanced suppression options and either tick 'Enable Automatic Suppression During Import' when importing a new file, or select 'Suppression>Find Suppressions', to suppress a pre-imported file.

For further information on using the suppressIT module, please refer to the suppressIT section of the User Manual.

Hosted Service

The Hosted Service is accessible from the Jobs menu using the Submit Data to Hosted Service option, and also from the very end of the processing wizard. With this option (even if you don't have suppressIT and addressIT), you may:

- identify suppressions (e.g. deceased records and people that have moved house - known as "goneaways")
- Append new addresses into records of people that have moved
- Append additional data via consumer names lookups
- Append additional data business data (SIC Codes, phone numbers, etc) and business validation

When you select the option to submit your data to the Hosted Service, you will see the following options screen:

Hosted Service UK Options

Nationality of Data: UK

Cost Forecast | Contact Details | Address/Email Verification | Suppression Screening | Additional Royal Mail PAF Data | Dun and Bradstreet Data/Names Data

Production and Mailing Costs:

Production Cost Per Item: £ 0.20 Mailing Cost Per Item: £ 0.20

Projected Suppression Counts and Savings:

Estimated Number of Suppressions: 109

Estimated Net Saving: £43.6

These projections are for Equifax disConnect Gone Away and Deceased suppressions only. By default all common suppression files will be used so counts will be higher, particularly for Deceased suppressions.

Accurate counts and costs will be provided for you before you are committed to paying for the suppressions involved and you will be able to select or deselect individual suppression files at this stage.

Cancel Continue

The Hosted Service Options screen enables you to edit the configuration file selected in the HostedService SSIS task. The different options are categorised as follows:

Nationality of Data: Use this to specify the nationality of the data that you will be submitting. This can either be set to UK, US or Worldwide. Some services (Suppression, Additional Royal Mail PAF Data and Dun and Bradstreet/Names Date) are only available for UK data.

Cost Forecast: This provides an indication of how much money could be saved on production and mailing costs, by removing suppression records from the main file.

Contact Details: Here, you must enter the details that helpIT systems should use to contact you, after receiving your hosted service data upload.

Address/Email Verification: In this tab, you can opt to use helpIT's address verification service. In addition, for UK data, you can choose to have DPS codes appended to your data, or for US data; USPS DPV codes. You can also opt for email verification, which is only available if your source data has an email field mapped.

Suppression Screening: This tab provides options for address and telephone suppression screening services. All suppression services can be used to either permanently remove suppressed records or (for a lesser cost) temporarily remove suppressed records.

For Goneaway and Mailing Preference services, you can select the suppression level which can be either Individual (matching on full name and address) or Family (matching on surname and address).

For telephone suppression, you can choose to suppress against Consumer or Business Telephone Preference services (or both).

Address suppression is only available for UK data. Telephone suppression is only available if there is a telephone field mapped in the source data.

Additional Royal Mail PAF Data: This tab offers various types of data, supplied by Royal Mail, that can be appended to consumer records in your main file. This is only available when processing data of UK nationality.

PAF & Business Enhancement/Append: This tab offers business related data supplied by Dun and Bradstreet as well as Names data, that can be appended to records in your main file. This is only available when processing data of UK nationality.

Once data has been submitted to helpIT systems and helpIT has officially accepted the job, the data will be processed by helpIT and helpIT will then send you a **return file**. The return file will contain all the information needed to update your main file. The update process might include deleting/flagging suppressed records, appending new addresses or appending consumer/business data. This will all depend on which option were selected, prior to submitting data to the Hosted Service.

The return file will have the same name as the main DBF file, but will have a ".SBS" file extension instead of ".DBF". To use the return file, you will need to save it in the same directory as the main DBF file. Then, you must start matchIT, open the main DBF file, then select **Process Hosted Service Return File** from the main Jobs menu. matchIT will provide information in the main feedback screen, to inform you of the number of flagged/updated records.

In the case where new addresses are appended to records, the original addresses will be stored in fields O_Address1, O_Address2, etc, to enable you to examine the differences between the old and new addresses.

Matching

Introduction to Matching

In matchIT, there are two critical steps: the first step is the Import or *Extract* process, this process performs (optional) *data enhancement* and generates *Match Keys*. The second step is the actual *Find Matches* step itself. In turn, the Find Matches step can be broken down into two steps as follows:

Match Key – Definition

In an ideal world, a user would be able to compare every single record in a database with every other record in the database. In a 10,000 record database, this would mean you would do roughly $10,000 * 5,000 = 50,000,000$ comparisons – even on this small database, the processing time would be unreasonably long.

Another problem with comparing every single record with every other record is that you may find numerous false matches – records which are obviously not matches to the human eye, but where certain key elements are either the same or empty. For example, if the name and part of the address are the same, and the postcode is blank, then it may add up to give a matching score.

Although this score may be fairly low, pairs of records like this should not usually be reported as a match at all, because they would obscure genuine ("true") matches with a lot of miskeying and inconsistency between the records: if too many false matches are reported, it becomes difficult for the user to "see the wood for the trees".

We need a way to improve on this process, both to cut down the sheer volume of comparisons, and also to reduce the number of false matches that may occur. The way to do that is by using *Match Keys* – a match key is something that groups of records in a database have in common, which indicates that detailed comparison of the records is worthwhile to see how well the records match each other in other respects. The records within these groups are only matching *candidates*, they may not be true matches – further inspection is necessary to check if they are true.

To reduce the number of comparisons, we can look at a field and say that only records that match the value of that field are potential matches. For example, we could select a Surname field (if the surname is held separately from the title and initials), this would only compare records of individuals with the same surname. This would instantly and drastically reduce the number of comparisons we would have to do. Now, for example, Mr Smith would not be compared to Mr Jones, because their surnames are completely different. All the Smiths would be compared, because there is the possibility that they might be the same person. In this approach, we have used the Surname field as a *Match Key*.

This approach is an improvement on our original idea, but it has its limitations. Mainly, it does not allow for miskeying of the surname. For example, take the name Shore. People generally expect this to be spelt Shaw, as this is far more common than Shore. The two spellings *sound* the same, but our solution above would not compare Mr Shaw and Mr Shore, because the surname field is different. The obvious solution to this is to use a "sounds like" version of the Surname field as a *Phonetic Match Key*. The *Extract* process takes important fields (such as name, address, company), and generates phonetic versions of the key elements in those fields.

However, even this approach has its drawbacks. The main problem is that this still gives us too many records to compare (most of the time). For example, if you are comparing records across

the whole country, there are a lot of Smiths – and Mr Smith in Edinburgh is obviously not the same as Mr Smith in London. Secondly, it does not cut down on the number of false matches. To get around this, we use combinations of fields to narrow the search. In the example above, it would be a good idea to consider part of the postcode code as well. So we may choose something like phonetic key of surname plus the outward bound (first half) of the postcode. This is a more explicit *Match Key* than just phonetic surname.

In matchIT, we do two or three scans of the database, using different Match Keys to find all the possible matches. If, for example, the two Mr Smiths above were the same, but one record did not have a postcode, we would miss the matching records if we relied just on phonetic key of surname plus the first half of the postcode. This is because the search requires the first half of the postcode as well as the phonetic surname to be the same, in order for the two records to be in the same "candidate group". However, if the street in both the records is the same (which will be the case if they are true matches), we can do a second search based on phonetic key of surname plus the phonetic key of the most significant word(s) in the street, this would find the match on the second scan of the database.

At the start, we mentioned that there are two steps to finding matches. The process we have described above is the process of establishing *Match Keys*. This helps us cut down the number of potential matches that are fed into the second step, which is the *Match Score* step – this step enables us to determine how well the other data matches in each pair of records.

Match Score – Definition

So, now we have two records that may or may not be for the same person (or family, household or company). If we have used the Match Key process above, then the likelihood of them being the same is much improved.

We will now go through the record, field by field, and work out how similar they are. Each field can contribute to a *match score*, depending on how close those fields in the records are. At the end, we have an overall score that tells us how alike two records are – the higher the score, the more similar the records are. When deleting duplicates with matchIT, you can enter a threshold score, for and above which matchIT will automatically flag one record from all matching pairs.

With most data files, all pairs scoring above a particular score (say 90) will be true matches and anything below (say) 80 will be false matches – this leaves a grey area between (say) 80 and 90 where most of the pairs are true matches but some are false. For "underkill", you can therefore enter (say) 91 as a threshold score for deletion. For "overkill", you can enter 80.

This process works well, but it is essential that users fine tune it themselves. This is because matching requirements can vary from company to company, file to file and even job to job. For example, sometimes you want to dedupe to individual level, sometimes to company or family. In addition, data files vary widely in the structure and overall "shape" of their data". Sometimes postcodes are reliable and complete, sometimes they are unreliable. For non-UK addresses, they usually only indicate the town, not (as with UK postcodes) the street or part of a street. There are many ways that the data can differ or be incomplete, and this frequently changes with every new file that you "dedupe", or match against other files.

Because we know that everyone's data is different, we have allowed the way that two records are compared to be customised, using a parameter table that tells us how much each field contributes to the overall matching score. Using this table, we can tell matchIT how important each field is in the matching process. We call this the *Weights* table, as it reflects the relative weighting that each field has towards the total match score. For each field that the user wants to match on, there are five weights, representing whether the pair of fields in the two records is a *Sure*, *Likely* or *Possible* match, or whether *One* or *Both* of the fields are *Empty*. If a pair of fields is quite different, it is given zero weight i.e. it does not contribute at all to the total matching score.

For name and address matching, matchIT compares the elements of the name (or address) as a whole, rather than just comparing them element by element – this allows it to match names where

some of the components are omitted or in a different order in one record (e.g. John Michael Smith and Mike Smith, or addresses which have a house name in one record but not in another).

To summarise, the *Match Keys* act as a filter, filtering in candidate pairs that may be matches. Match Keys work best when using phonetic keys, and combinations of fields. After that, each candidate pair of records has a *Match Score* calculated for it, based on the *Weights* table. This allows matchIT to work out how well each pair of records matches.

Further detail on how matching works is given in the Online Help.

Summary of Finding Matches

To find matching records in a Main File, the following steps are used:

- Import the data. The simplest method is using the "[Setup Wizard](#)". If you are not using the Setup Wizard, select Restore Standard Parameters from the dialog which you see when you select Import, and choose the appropriate matching configuration before you Import the data – see [Importing without using the Setup Wizard](#). If you are importing through the Setup Wizard, at the end of the Setup Wizard, tick the checkbox for "Create Match Keys" and choose the appropriate matching level in the "Select matching level" radial.
- Utilize the Find Matches option either at the end of the Setup Wizard, from the Matching menu, the toolbar, or from the dialog at the end of Import.
- Choose the Match Keys to use (unless you chose Find Matches at the end of the Setup Wizard, in which case default Match Keys are used).
- Wait while matchIT searches for possible duplicate records.
- View, verify and/or flag the matches that have been found.



*Find Matches
button*

Matching Parameters

When importing data through the Setup Wizard, matchIT asks what level of matching is to be used. The choices offered depend upon whether the data is business or personal.

The parameters can also be modified for specific requirements. To change these, either select Save/Restore Setup (see "[Multiple Parameter Sets](#)") or select "Options" from the Jobs/Setup main menu and change the "[Matching Setup](#)" - see Online help for more information".

Matching Levels

The Setup Wizard allows you to choose between contact and business level matching, only if there is a field named "Company" in your Main File.

Residential Data

Individual Level

This will find matches at an individual level e.g. John Smith and Mary Smith living at the same address will not be matched, nor will John Smith and James Smith. However, John Smith and Mr J E Smith will be matched and (by default) John Smith and E J Smith will be regarded as a possible match, as perhaps E J Smith is known by his middle name.

Family Level

This finds matches on surname at the same address e.g. John and Mary Smith at the same address will be matched, as will John Smith and James Smith, and all but one record will be flagged.

Household Level

This matches records with the same address, regardless of surname e.g. John Smith and Lucy Jones living at the same address will be matched.

Business Data

Contact Level

At contact level, deduplication is performed down to one record per person at a location. This is effectively the same as individual level matching for residential data, as by default matchIT ignores the company name for contact level matching – this tends to work better because company names change so much, different companies within the same group often have employees in common etc. For example, John Smith and Mr J E Smith will be matched, even if one is at British Steel plc and the other at Corus, as long as the addresses and postcodes match well enough. However, John Smith and Fred Brown at the same address/postcode will not be matched

Business Level

This level is used to produce one record per company or business. Therefore, two different employees working for the same company will be matched, as long as the addresses and postcodes match well enough. Once you have selected to continue with Business Level matching, you will be prompted for Loose (the default), Tight or Legal business matching. These options are illustrated in the window prompt.

- two keys that do not feature phonetic surname e.g. for UK data:
Postcode
Address Key
or (for non-UK data):
Address Key
First 5 characters of ZIP code + Phonetic Key of Street.
 - one key that does feature surname to pick up extra household matches where the surname is the same but for some reason the household match is too fuzzy to be picked up by either of the first two keys e.g. for UK data:
Outward Postcode + Phonetic Surname Key
or (for non-UK data):
Phonetic Surname Key + Phonetic Town/City Key.
- The set of default keys provided with matchIT may be overwritten by checking the box "Save as default keys?", but don't do this unless you have a thorough understanding of how match keys work.

Selecting Specific Keys

To select your own keys:

- Click "Clear Keys" to clear all currently chosen keys, if required.
- Highlight the field you wish to use in the Field/Key list and click "Select Key" or double click and this field will be added to the key list.
- To add another field into this key, highlight the second field to be used and click "Select Key" again – in this way, you can build compound keys such as Outward Postcode + Phonetic Surname Key.
- Click "New Key" to add another and repeat from step 2.

If you make a mistake, just click on the key that is wrong (in the "Keys Chosen For Matching" box) and click "Remove Key".

"Verify Keys" will check your chosen keys for you and suggest any problems which may occur with using those keys.

New Analysis

If you are working with a Main File that has already been analysed for matches, you may not wish to lose any previous matching results. If so, uncheck the box "Is this a new analysis?"

Matching Summary

Matching information is recorded in the Perform (short for "performance") database. The Matching or Overlap Summary shows information from this database, which you see automatically at the end of the analysis, or you can view it from the Matching menu. The information displayed is as follows:

Database in use: the database you are using.

Number of records: the total number of records in your database.

Number of matching pairs: the number of pairs of potentially duplicate records that matchIT has found.

Number of potential deletions: the number of records matchIT will flag, provided you accept the results and flag at the default threshold score. This is often different to the Number Of Matches Found. This is because if you have more than two records which match each other, say 1, 2 and 3, then record 1 matches record 2 and record 1 matches record 3, but also record 2 matches record 3. This gives 3 matching pairs, but only 2 records will be flagged. This exponentially increases for larger match sets: 10 records in a match set means 45 matching pairs, but only 9 potential deletions!

Matches found by match key

Run number: When matchIT does its Find Matches routine it makes several passes (or runs) over the database, on each of the chosen Match Keys.

Records compared: the number of records matchIT has read for each match key. This may be less than the number of records in the Main File if there are records with blank keys, or a Start Range was specified.

Matches found: the number of matching pairs found by each key.

Match Keys used: the Match Keys used since the New Analysis box was last set On.

Matches found by score range

Score range: This shows ranges of match scores depending on the *Minimum Score To Report* and the maximum possible score.

Number of matches in range: This is the number of pairs of matches found in each score range.

The most useful options are those in the top half of this screen:

There is one run for each matching key selected.

- If the Report Grouping option is set to Pairs, then it is possible to view matching pairs that were found by a specific key by unchecking the All Runs option and entering the number that corresponds to that specific key. Alternatively, to view all matching pairs, check All Runs. If the Report Grouping option is changed to Sets, the All Runs option will automatically be checked, as it is not possible to view sets from a specific key.
- Matching records can be grouped in pairs (e.g. John Smith, Mr J Smith and J Smith Esq at the same address will be shown as three pairs of matches), or in sets where all records matching each other are displayed together i.e. the three Mr Smiths above would be shown as one set of three records.

Potential duplicates are given a score based on how well they match: the higher the score, the closer the match

- The range of matching scores for which the results should be displayed is also controllable and (if viewing in Pairs) records can be sorted by score. Set the score sample size to e.g. 10 if you wish to see just the first 10 pairs for each match score. Selecting this automatically sorts the records by score and displays them in pairs
- The report format will default to Business or Residential, dependent upon whether there is a company field in the Main File. (See "[Matching](#)") You can choose your own report layout from here and also Verify Matches (see next section).

If you want to print the report to a printer other than the default printer, or to print more than one copy or a page range, you should select a Destination of Printer, rather than print from the Print Preview.

- Destination can be either:
 - Preview for a print preview,
 - Printer to print the report,
 - File output to a text file or
 - PDF to save a PDF version of the report.

- The results from all runs (since the New Analysis box was checked) can be viewed, or one run number can be selected by unchecking the "All runs?" box. The default run number is that of the last matching run performed.
- Matching records can be grouped in pairs (e.g. John Smith, Mr J Smith and J Smith Esq at the same address will be shown as three pairs of matches), or in sets where all records matching each other are displayed together i.e. the three Mr Smiths above would be shown as one set of three records.
- The range of matching scores for which the results should be displayed is also controllable and (if viewing in Pairs) records can be sorted by score. Set the score sample size to e.g. 10 if you wish to see just the first 10 pairs for each match score. Selecting this automatically sorts the records by score and displays them in pairs
- The report format will default to Business or Residential, dependent upon whether there is a company field in the Main File. (See "[Matching](#)") You can choose your own report layout from here and also Verify Matches (see next section). The default reports used for business/residential matching are BIZPAIRS or BIZSETS.FRX and RESPAIRS or RESSETS.FRX respectively.

- Destination can be either:
 - Preview for a print preview,
 - Printer to print the report,
 - File output to a text file or
 - PDF to save a PDF version of the report.

Advanced Options

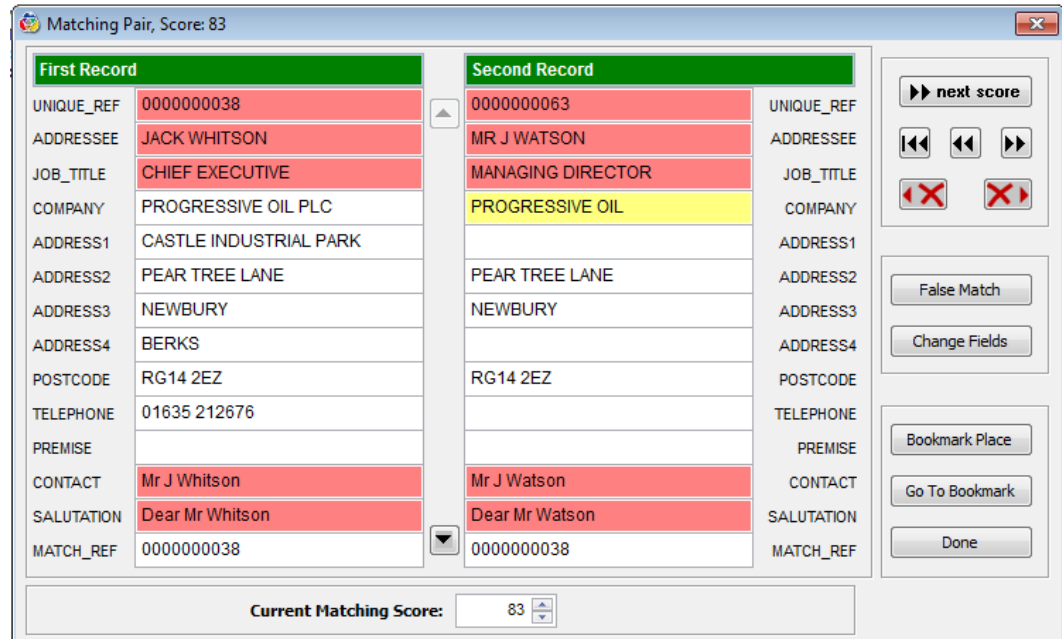
Verify Matches Window

Verify Matches provides an easy way of checking the quality of the matches found, even if you want to flag matches globally. Selecting **Verify Matches** from the **Matching** menu or other dialog shows all matches in order of score, lowest score first. Verify Matches is also available as a "Report Format" from the [View Matches](#) screen, where you can specify which runs to view, the score range and score sample size.

The Verify Matches option within matchIT has the ability to display matching records in either a pairs view (default) or a sets view. To change the default view for the Verify Matches option you will need to relabel a file named "NotVerifySetsFromWizard.txt" in the matchIT directory (C:\Program Files\matchITv6). Essentially the file should be named "NotVerifySetsFromWizard.txt" if you wish to examine records in the pairs view. However, if you wish to look at records in a sets view the file needs to be renamed to "VerifySetsFromWizard.txt".

For global deletion, see "[Flag Matches](#)". The default screen used for pairs of matches is shown below:




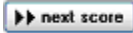
Verify Matches in Pairs



This screen will display potential duplicates, in pairs. The different coloured highlighting is used to help distinguish where the differing fields are in the records. Fields in red are different, yellow

shows information which is contained in the same field in the other record and white displays those fields which are identical.

The buttons in the top right part of the screen control movement through the table.

<p><i>Keyboard shortcut keys for next pair and previous pair are Page Up and Page Down.</i></p>		<p>goes back to the first pair displayed (lowest matching score selected).</p>
		<p>goes back to the previous pair displayed.</p>
		<p>goes forward to the next pair (which may or may not have the same score as the current pair displayed).</p>
		<p>jumps to the next pair with a different match score. If you are viewing the records in order of score (the default), this will be the next highest score. (A little message "No more scores!" appears in the top right when the end of the pairs is reached.)</p>

Below this pair the matching score is shown and (on the right), various buttons for dealing with a matched pair:

<p><i>Keyboard shortcut keys for Flag/Recall Left and Flag/Recall Right are Ctrl+left arrow and Ctrl+right arrow</i></p>		<p>To flag a record in Pairs format, select one of these buttons to flag the record on the left or right-hand side respectively. The button then changes: to recall a record, select the appropriate button with a green tick.</p>
		<p>If the pair shown is not a true match, you can select this button to remove the match – meaning that this pair will no longer be regarded as a match.</p>

False Match is Ctrl+Delete

Typically, you either flag false matches in a score band if most of them are true matches, or flag the odd true match if most of them are false. You do not need to both flag false matches and flag true matches within a score band, as global deletion will flag all matches above a match score as long as they have not been declared false. If you are using the Matrix Report or Group Matches feature, any matches you flag interactively will not be included. To allow this, you can increase the match score of any pair in the grey area, so that you move them into the area that is being automatically flagged or grouped.



This button allows you to enter the name or names of any additional fields that you want to see in the Verify window. Just scroll down and type the name of the field at the end of the list. You have to know the exact spelling of the field name or it will not be displayed, but you don't have to specify the field

type or width. You can also change the order in which the fields are displayed, by dragging the square button to the left of the name. Then select OK and say 'Yes' to the question "Make structure changes permanent".

NB: this question refers to the structure of a temporary work file, not the structure of the Main File.



This button asks matchIT to remember the current pair so you can return to this pair later if you are deleting a lot of matches interactively.



This button will return you to the marked pair.

Click "Done" when you have finished. If you have not marked your position in the file, matchIT will ask if you wish to. This means you can return to the same point at a later date.

Verify Matches in Sets

The screenshot shows the 'Verify Matches in Sets' window. On the left is a tree view of match sets. The main area compares a Master record (0000000038) and a Duplicate record (0000000063). The comparison is done field-by-field, with red highlighting for differences, yellow for fields present in the duplicate but not the master, and white for identical fields. Tick boxes between the records allow for data transfer to the master. At the bottom, a table lists the matches in the group.

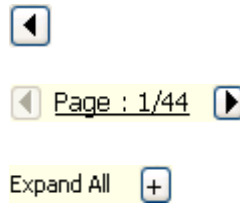
Unique_ref	Score	Deflag	Addressee	Job_title	Company	Address1	Address2	Address3	Address4	Postcode	Telephone	Premis
0000000038	MASTER	F	JACK WHITSON	CHIEF EXECUTIVE	PROGRESSIVE OIL PLC	CASTLE INDUSTRIAL PARK	PEAR TREE LANE	NEWBURY	BERKS	RG14 2EZ	01635 212676	
0000000063		F	MR J WATSON	MANAGING DIRECTOR	PROGRESSIVE OIL		PEAR TREE LANE	NEWBURY		RG14 2EZ		

This screen will display potential duplicates, in sets. The different coloured highlighting is used to help distinguish where the differing fields are in the records. Fields in red are different, yellow shows information which is contained in the same field in the other record and white displays those fields which are identical.

The tick boxes between matching records (in the top right part of the screen) control what information is transferred to the Master record.



specifies what fields to transfer



to the Master record.

transfers selected fields to the Master record.

goes forward to the next page of matching sets.

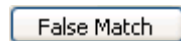
expands all matching sets shown in the current page of matching sets.

Below the matching pair display there are various buttons for dealing with that particular matched pair:

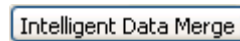


to flag the duplicate record in the pairs view section, select this button. The button then changes: to "Restore Record" which allows you to unflag the record.

False Match is Ctrl+Delete



if the pair shown is not a true match, you can select this button to remove the match – meaning that this pair will no longer be regarded as a match. The button then changes: to "Restore Match" which allows you to reactivate the displayed matching pair.

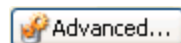


uses the Intelligent Data Merge (see Intelligent Data Merge) settings specified by the user to create a meta-record of the two records shown in the pairs section.

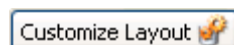
Typically, you either flag false matches in a score band if most of them are true matches, or flag the odd true match if most of them are false. You do not need to both flag false matches and flag true matches within a score band, as a global deletion will flag all matches above a match score as long as they have not been declared false. If you are using the Matrix Report or Group Matches feature, any matches you flag interactively will not be included. To allow this, you can increase the match score of any pair in the grey area, so that you move them into the area that is being automatically flagged or grouped.



quickly find records that contain a piece of information as specified by you. The records that contain the information will then be displayed in the Verify Matches in Sets window.



customizes the "Verify Matches in Sets" window by allowing the user to apply filters and sort orders so that only records of specified concern are displayed.

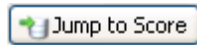


allows you to enter the name or names of any additional fields that you want to see in the

"Matches in Group" section. Just scroll down and type the name of the field at the end of the list.

You have to know the exact spelling of the field name or it will not be displayed, but you don't have to specify the field type or width. You can also change the order in which the fields are displayed, by dragging the square button to the left of the name. Then select OK and say "Yes" to the question "Make structure changes permanent".

NB: this question refers to the structure of a temporary work file, not the structure of the Main File.



jumps to the first matching set of a specified match score.

Click "**Done**" when you have finished.

Intelligent Data Merge

Introduction

The Intelligent Data Merge allows a user to construct a list of simple rules for the merging of matched records. These rules can then be applied to the merging of fields as part of other operations performed on the matching records. The idea behind the process is that it allows the user to extract the most important information from each pair of fields and combine that information into one field of superior quality. These enhanced fields are then inserted into the appropriate record (i.e. the destination record or record to be kept), thus improving the overall quality of the record.

Intelligent Data Merge configuration should be reviewed (via the Jobs/Setup menu, Matching Setup) if you change matching parameters, to avoid incorrect merging of data. If in doubt, you should not use this option. Thorough checking of results is advisable when using Intelligent Data Merge, especially on any new type of data.

Functionality

The process compliments the functionality of the [Transfer Data](#), [Flag Matches](#) and [Verify Matches](#) operations by giving the user more control over what data should be retained.

Transfer Data

The Transfer Data operation (from the Matching or Merge/Purge menus) allows a user to transfer data from specified fields in one record to those fields in the matched record. The IDM process can override the options for the Transfer Data operation. To use IDM in the Transfer Data option, simply check the appropriate box on the main Transfer Data option screen.

Flag Matches

The deletion process employs a Deletion Priorities table to select which record should be flagged. The IDM process will not override this, rather complement it by running after the choice of which record to flag is made, thus retaining valuable information in the flagged record and merging it with the kept record. To use IDM when deleting matches simply check the appropriate box on the screen that appears at the beginning of the deletion process.

Verify Matches

Within the Verify Matches operation, the IDM process operates as a tool which the user can control interactively.

Selecting this option will produce a "meta" record showing the result of the process on the selected fields. The process should take no more than a second or two and then the window on the right will appear. The window shows the results of the intelligent merge for the two records.

Only the fields which exist in both records and have been specified in the IDM Options set-up will appear. Clicking either of the **'replace'** buttons will insert these fields into the corresponding record and additional changes can then be made. Selecting **Discard** will return to the Verify view without making changes.

The Options Screen

The main options screen for the IDM process can be found under the menu **Setup > Matching Setup as Intelligent Merge Options**. This is described fully in the Online Help.

Intelligent Merge Options

Available Fields	Fields Selected	Default Options	Special Options
ADDRESSEE JOB_TITLE COMPANY ADDRESSLINES POSTCODE TELEPHONE SEX STD_CODE REST_PHONE MATCH_REF BASE_SCORE SET_DUPS DDFMTCF	JOB_TITLE COMPANY TELEPHONE FAX DEPARTMENT ADDRESSLINES	Default Priority: [Dropdown] Casing: [Dropdown]	<input type="checkbox"/> Name Completion <input type="checkbox"/> Assume Surname Exists

Pressing 'OK' will save the selected fields and corresponding options for use in the Intelligent Data Merge procedure. Pressing 'Cancel' will cancel the operation.

Available Fields - This list will only show those fields which exist in the current database or, in the case of two databases, which exist in both.

Special Options - 'Name Completion' will only be available if an 'Addressee' field exists.

Default Priority

This option controls the standard merging of all fields. Clicking once on a fieldname in the list of selected fields will make these options available. If an option does not become active then it means that the particular option is not available for the selected field. Additionally, the priorities available for selection may also differ depending on the selected field:

Keep Longest/Keep Shortest – These options allow the user to keep the field which is longer or shorter respectively.

Keep Highest/Keep Lowest – These options allow the user to keep the highest or lowest value field. If both fields are numeric, then simply the highest or lowest value will be kept. If the fields are not both numeric then a string comparison will be done and the higher or lower string will be kept.

Keep Uppercased/Keep Lowercased/Keep Propercased – These options analyse each word in the fields and will merge fields together depending on the case of each word. For instance, the process will be able to pick out only the uppercased words in both fields and combine them into one field.

Keep Value – This option allows the user to enter a preferred value – if one of the fields being compared has this value, that value will be kept.

Keep for Other Value – This option allows the user to enter a value or condition referring to the contents of another field. The data for the field selected will be kept from that record containing the “other field” which satisfies the condition. The contents of the Value entered for this option must be one of the following:

- highest(field_name)
- lowest(field_name)
- longest(field_name)
- shortest(field_name)
- field_name = value

As this feature is not expected to be used by inexperienced users and is expected to be a standard setting which is rarely changed, there are no checks for the correctness of the syntax entered here.

You shouldn't use the other value in the "Keep for Other Value" as a value to merge in its own right, as that will compromise the check for the value in Keep Other Value.

Keep if Length – This option allows the user to enter a preferred field length – if one of the fields being compared has this length, the value from that record will be kept.

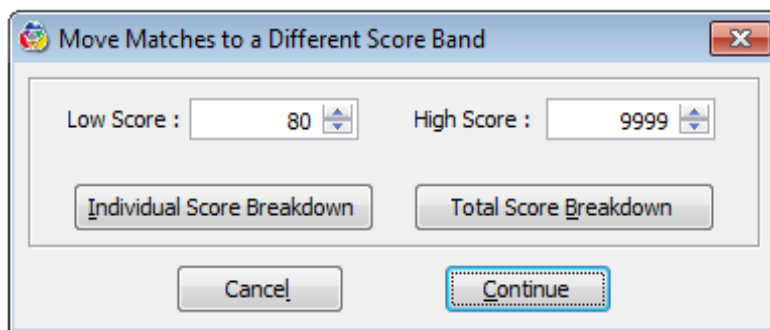
Additional Information

Certain fields, such as Address and Telephone, are dealt with in a different way to others in the merging process. The overall way in which these fields are treated cannot be altered. Please see the Online help for further information.

Flag Matches

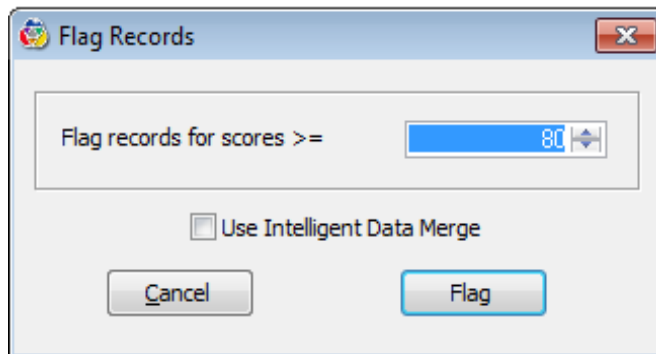
Flag matches is used to flag records above a certain matching score without further user intervention. It can be selected from the screen displayed after finding matches or from the Matching menu.

If selected from the main menu, you are first asked if you wish to modify any of the scores (e.g. to flag false matches where you know the reference numbers of the pairs involved). Also, you can view how many pairs achieved each match score and flag as False any particular match score – for details on this, see [Total Score Breakdown](#).



Modifying scores is not usually necessary: click Next if you do not wish to change anything.

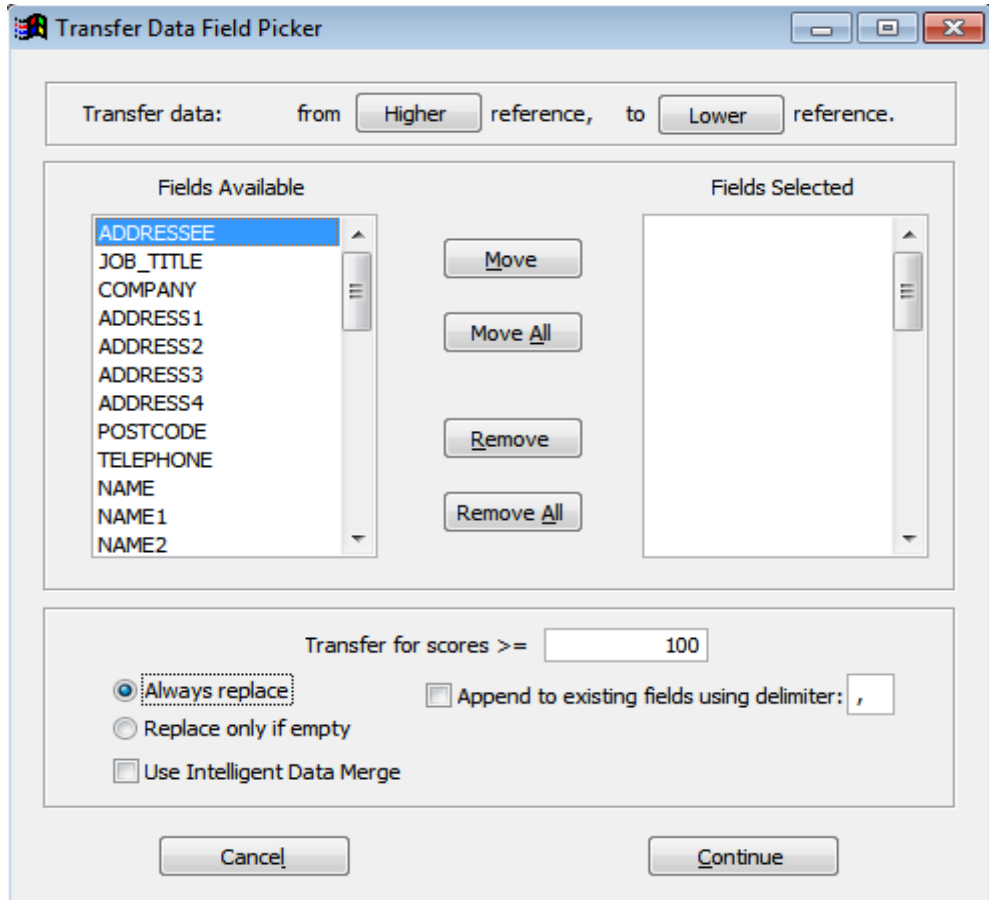
The "Flag Records" screen is displayed next (or straight away if you chose this option after finding matches). Here you enter the matching score at and above which you want duplicate records removed. It defaults to the [Minimum score to report](#):



If you leave the score at the default, only those records that weren't given a Matching Score will be left in the Main File. If you enter e.g. 100, it will only flag records in the Main File with a Matching Score greater than or equal to 100, leaving one record for each individual, company, family or household, depending on the level of matching you selected previously. You can also select to use [Intelligent Data Merge](#).

Transfer Data

The Transfer Data operation (from the Matching menu) allows a user to transfer data from specified fields in one record to those fields in the matched record. However, the IDM process can override the options for the Transfer Data operation. To use IDM in the Transfer Data option, simply check the appropriate box on the main Transfer Data option screen.



Below the field picker there are other options can be set:

- **Transfer for scores** – data is only transferred for records whose matching score is equal to or greater than the value shown.
- **Transfer data** – from Higher to Lower shows where the data will be copied from to. Clicking on one of the buttons (Higher/Lower) will swap the order.
- **Always Replace/Replace Only if Empty** – If there is data in a field that is about to be overwritten, matchIT needs to know whether to replace it (always replace) or leave it (replace only if empty).
- **Blank All Fields/Append to Existing Fields** – You can optionally choose to blank all the fields you are transferring to before starting, or append the data being transferred to that already in the field.
- In all cases, you should ensure that the field being transferred to is large enough to contain all the data or some of it will be lost. To make sure that only the best match is

used to transfer data across where many records match one, define a field MATCHSCORE (numeric 8) in your receiving file, using "[Main File Layout](#)".

- Click "Continue" to start the process.

Group Matches

Group Matches is available from the Matching menu, and is used to collate match sets after a matching run. For this to happen there must be a MATCH_REF field in the Main File layout, which is of type character and is at least as wide as the UNIQUE_REF field. matchIT will ask for a threshold score, and then collate all records which are in a match set with a matching score higher than it. It does this by determining the 'master' record of a set; that is, the one which is to be kept in favour of all the others in the set. It then copies the contents of the master record's UNIQUE_REF field into the MATCH_REF field of all of the other records in the set. This means that if the Main File is viewed in MATCH_REF order, all the match sets will be grouped together.

matchIT will do the exactly the same thing as described above if 'Flag Matches', is chosen from the Matching menu, but will also flag the matches. Group Matches will **not** flag any records.

Delete Suppression Records

If you have processed a job created by the Multiple File Wizard, you are prompted at the end to remove suppression records from the mailing file. If you don't say "Yes" to this prompt then, you can remove them via this menu option.

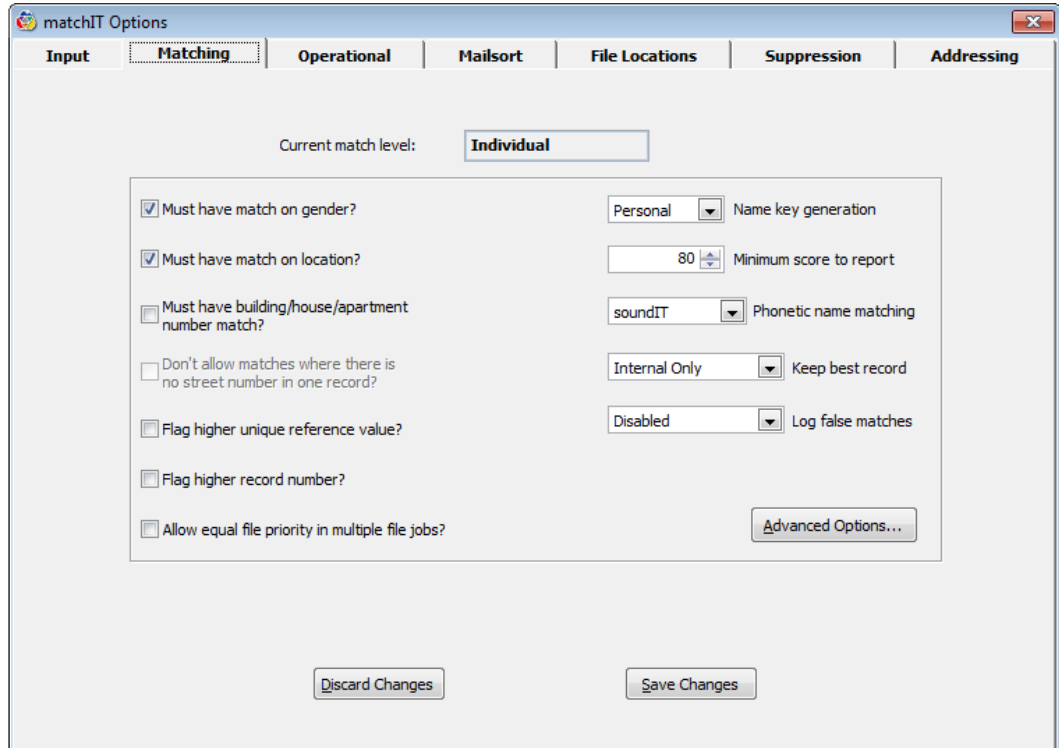
Total Score Breakdown

Total Score Breakdown is available from the Matching or Merge/Purge menus, or before you select Delete Matches or any of the Merge/Purge options from the relevant menu. This facility shows the matches found on the currently selected Main File (or Files) categorised into score bands. It displays the number of matches found at a particular score, an example of a matching key that was used to find them, and a flag value, which can either be True (T) or False (F). Setting this flag to **False** marks as False matches all of the matches found at that score, so they will not appear on any future matching reports. This is useful when, after verifying or viewing the matches, it is found that matches at a particular score are all False, but some lower scores are True matches.

Matching Setup

This section is for users who wish to customise matchIT's matching setup. We recommend that you have some experience with matchIT before changing the default setup.

Basic Matching Options



Must have match on gender

If you set this parameter "on", then matches where the sex is different (where the sex is normally deduced from the title) will be suppressed, even if the name matches and there is no independent confirmation of the sex by the forename. Note: even if you have this parameter off, matchIT will always return a nil score on name (if you are not doing family matching) if the sex of the two records is different and is independently confirmed by the sex deduced from the forename of each record.

Sex is only regarded as different if one record must be Male e.g. Mr and the other Female e.g. Mrs, so it will match Mr and Dr, or Mrs and Dr etc. but not Mr and Mrs.

Must have match on location

If this parameter is set "on", then a matching pair is not reported if a 'location check' has failed. In detail, this means that the postcodes in the two records (if present) must achieve at least a probable match with the address score at least a Possible match, or the address score must be at least a Likely match irrespective of the postcodes, or the postcodes must achieve a Sure match

irrespective of the address. This is to prevent false matches where there is some match on address, but where the addresses are clearly not the same, for example "10 High Street, Bookham", and "10 High Street, Alford". Switch this parameter **off** if you want to match people or companies in different locations; you may want to match on items of data that are independent of location, such as date of birth or bank account. See also the section about Address Matching.

Must have building/house/apartment number match

If you set this parameter "on", then matches with different premise or flat numbers in the addresses will be suppressed. This could be appropriate if you have a very localised file with a lot of neighbouring records, perhaps with similar names.

Don't allow matches where there is no street number in one record

If this parameter is "on", then matches where one of the records has a premise number in the address, and the other hasn't will be suppressed. This is useful when your file has a lot of addresses with house names in the address lines. Note that this parameter has no effect if the "Must have premise match" parameter is off.

Flag higher reference

(does not apply to matchIT **Lite**)

This specifies the default rule for global flagging of matches, when the deletion priorities are equal or switched off (see [Keep best record](#) and Online help). If you set the Flag Higher Reference parameter "on", the record with the higher reference number from each pair is flagged by the Flag Matches option; otherwise the earlier record in the file is flagged.

Name key generation

This parameter governs how the NAME1, NAME2 and NAME3 Match Keys are generated; if the parameter is set to 'Personal', the keys are generated from the personal name, if it is set to 'Business', they are generated from the company name (See the [Phonetic name matching](#) parameter). If you want to switch from any other type of matching to business matching or vice versa, you should do so by using the Save/Restore Setup (see Online help for more information on Save/Restore Setup) option, rather than by just changing this parameter. This is because business matching uses different matching rules to other matching levels.

Minimum score to report

The Minimum Score to Report is the minimum matching score necessary to allow the records to be reported as potential matches. These records are written to the Matches table (or the Merges table for Find Overlap processing).

Phonetic name matching

There are two stages to the matching process that matchIT uses; the key stage and the scoring stage. The first stage creates standardised and phonetic keys based on the input data, which allows potential matches to be identified. The second stage scores each pair of potential matches, using phonetic and fuzzy matching. This parameter governs the phonetic algorithm that matchIT uses when generating keys and for scoring.

There are three choices available:

- **soundIT**

matchIT provides a unique phonetic algorithm for name matching, called *soundIT*. *soundIT* takes account of vowel sounds and syllables in the name, and, more importantly, determines the stressed syllable in the word. This means that "Batten" and "Batton" sound the same according to *soundIT*, as the different letters fall in the unstressed syllable, whilst "Batton" and "Button" sound different, as it is the stressed syllable which differs. Another advantage of *soundIT* is that it can recognise groups of vowels and consonants that form vowel sounds – thus it can equate "Shaw" and "Shore", "Wight" and "White", "Naughton" and "Norton", and "Leighton" and "Layton" (which are all reasonably common English surnames).

This algorithm was developed with extensive testing on a large table of the most common surnames in the UK. Therefore, it is specifically designed to be used with English names. If a file with mostly non-English names is processed through matchIT, then you may want to try the 'Loose' *soundIT* or Soundex algorithms instead. For US data we recommend that you use *soundIT*, because it is proven to work well also with Spanish, German and other names that occur commonly in the US. *soundIT* has been designed with foreign language versions in mind (i.e. for data collected in countries where foreign languages are spoken). These could quite easily be developed, according to demand. Please contact your supplier if you are interested in this.

Note that the keys that matchIT generates are 'Loose' *soundIT* keys, where all vowel sounds are equated, together with some consonants, such as 'm' and 'n', 'd' and 't', 's' and 'f'. This is so that potential matches are not missed at the key stage; matchIT uses the 'full' *soundIT* algorithm at the scoring stage, which will separate out false matches from true matches.

- **Loose soundIT**

This option is effectively the same as the *soundIT* option, except that matchIT uses the 'Loose' *soundIT* algorithm as described above at the scoring stage.

This is for use mainly with non-English names, on which *soundIT* works less effectively, and can miss true matches. This option should not be used on files with mainly English names, as it can potentially lead to more false matches.

- **Soundex**

Soundex is a widely-used algorithm (patented just after the First World War!), which constructs a crude non-phonetic key by keeping the initial letter of the name, then removing all vowels, plus the letters H, W and Y, and translating the remaining letters to numbers. It gives the same number to letters that can be confused e.g. 'm' and 'n' both become 5. It also drops repeated consonants and consecutive letters that give the same number e.g. S and C. It only takes the first four characters of the result, or pads it out with zeroes if it is less than four long. Thus all the common spellings and misspellings of the name "Tootill" equate to the same Soundex key: Tootill, Toothill, Tootil, Tootal, Tootle, Tuthill, Totill are all translated to "T340".

The algorithm that matchIT uses is an enhanced version of Soundex, and is for use mainly with non-English names. This option should not be used on files with mainly English names, as it can lead to false matches e.g. Brady, Beard and Broad get the same Soundex key.

- **Non-phonetic**

This option constructs a non-phonetic version of the supplied name fields as match keys and allows only non-phonetic name matching.

Note that, at the scoring stage, matchIT performs name comparisons using data from the NAME field, not from the phonetic keys NAME1, NAME2 and NAME3 – this way it can check for simple typing errors such as "Wilson" and "Wislon" which do not match phonetically.

Keep best record

This parameter governs the use of deletion priorities (see Online help), where matchIT makes a decision about which is the 'best' record to keep from a matching pair e.g. the one with the most data. There are three settings: Disabled, Internal Only, and Internal and Overlap. Set the parameter to Disabled if you don't want to use deletion priorities, and want to use default rules (see the '[Flag Higher Reference](#)' parameter). Otherwise set it to Internal Only, where deletion priorities will be used on matches in a single file, or Internal and Overlap, where they are used on matches in a single file and across files.

Advanced Matching Options

The Advanced Matching Options are described in the Online Help.

Modifying the Weights Used for Matching

Select the Weights option from the Jobs/Setup; Matching Setup menu if you wish to alter the values of the weights attached to the different fields in the matching process. You should not modify the matching weights unless you have read and understood the description in "[Introduction to Matching](#)".

A full description of Matching Weights and the Matching Matrices is given in the Online Help.

Deletion Priorities

The Flag Matches option deletes the records with the lowest priorities from each set of matches.

If priorities are equal, it keeps the latest record on the file from each set or the one with the lowest Unique Reference, depending on the value of the Flag Higher Reference? Basic Matching option.

A full description of Deletion Priorities is given in the Online Help.

- **Field Name** is the name of the field in the selected Main File - if any field is not present, the rule for that field is ignored.
- **Comment** is just for your guidance, to explain if necessary what the field name contains.
- **Priority** shows the value which is accumulated for each rule that applies to the record being evaluated. When deciding which record to delete, matchIT accumulates priorities for each record and keeps the record with the highest total priority.
- **Value** specifies what Value the Field Name must be to obtain the Priority shown. The usual Value is "Empty" e.g. in the first rule above, if the surname (or first business name when matching business names) is empty, a Priority of -99 is given, which downgrades that record heavily. The other common Value is a constant e.g. if you specify rules as follows:
 - There are some special Values which only apply to specific field names:
 - "Default" applies only to the salutation field: the record will be downgraded in the example above if the salutation is the current default e.g. Dear Customer rather than e.g. Mr Smith.
 - "First Name" and "Initial" apply to the first forename field, where it is a full name or an initial rather than empty. "First Name" can also apply to the 2nd significant word in a business name, when matching business names.
 - "Derived" applies only to the Prefix field: if the Prefix is derived from the first forename e.g. Ms for Christine, the record will be downgraded compared with a supplied Prefix such as Mrs or Dr.

If you define a field called DEL_PRI (numeric), matchIT will record the priority of each record that it examines for potential deletion, so you can check that your priorities are working as you expect.

Multi Level Matching

Multi-Level Matching is performed using a job script (see Job Scripts for more information), which incorporates a number of bespoke Visual FoxPro programs, as well as customised settings and modified match keys.

The script is supplied as a template, and by default is set up to use 'Example1.TXT' and a corresponding DBF file. When the script needs to be used for processing live data, the user will need to modify the script in such a way that it points to the source data and corresponding DBF file(s). Once the user has pointed to their files, the script will be ready to run.

The job script will perform an Import and dedupe, it will then modify the structure of the working DBF and will perform the deletion step a total of three times. Upon finishing, the working DBF will contain separate fields displaying individual level, business level and address level matches. These field will enable the user to see which records match which, at what level, and how many other records any one record may match.

When the script has finished, the user can either export the data and matching results manually, using matchIT's standard Output menu, or can set up another script specifically for Output. This output script can be set up to run as soon as the Multi-Level Matching script finishes.

Breakdown of Job Script Rows

Each row displayed in the Job Editor, when browsing the Multi-Level Matching job script, is listed and described below. The Job Editor dialog can be accessed by selecting the job script from within the 'Job Maintenance' dialog, then clicking on 'Modify'.

Most rows in the script feature a program, and as these programs have been designed not to require any further modification from the user, the descriptions below merely give an overview of what each program does. For further information, please contact [helpIT systems](#).

- **Row 1 ("1 RESTORE SETTINGS.PRG")**

Restores all parameters, weights and matching matrices required to find matches on all levels: NAME, COMPANY and ADDRESS. The parameters will force matchIT to generate name matching keys using individual names. Matching does not take place at this stage.
- **Row 2**

Imports the source data file into a pre-defined DBF structure and generates match keys. At this step, the options (accessed via the 'Options' cell) must specify the correct input format.
- **Row 3 ("2 RENAME NAME FIELDS.PRG")**

Renames the name matching keys (generated during the previous step using individual names) from NAME to IND_NAME, NAME1 to IND_NAME1 and from NAME2 to IND_NAME2. New blank Name fields are generated. The parameter that specifies which type of names are used to populate the name key fields are changed from 'Individual' to 'Business' in preparation for the next step.
- **Row 4**

Regenerates name matching keys following the parameter change in the previous step. Keys are generated using business names.
- **Row 5 ("3 ADD IND WEIGHT.PRG")**

Modifies the weights table, adding a weight on individual name as well as business, address and postcode.
- **Row 6**

Finds matches using specific match keys, which incorporate phonetic company name, phonetic individual name, postcode elements and phonetic address keys.
- **Row 7 ("4 COPY MATCHING RESULTS.PRG")**

Finds matches at address level using an additional program, which re-evaluates address-matching using different matching options from the previous matching run.

With all levels of matching now performed, the program in turn deletes and recalls matches at each level, each time populating the MATCH_REF and SET_DUPS fields with matching information that corresponds to that level. After each Delete step, the MATCH_REF and

SET_DUPS fields are renamed accordingly; after deleting individual level matches, these fields are renamed 'INDIV_REF' and 'INDIV_DUPS', after business level deletion; 'COY_REF' and 'COY_DUPS' and after address level deletion; 'ADDR_REF' and 'ADDR_DUPS'.

On completion of this program, the Multi–Level Matching script finishes. The processed table now contains references grouping matches together at the level they matched at.

Before Running the Multi–Level Matching Script

Before the Multi–Level Matching Script is run, it must be set up to point to the file that is to be processed. Row 2 of the script, which by default points to Example1.txt in the 'Source File' column, should instead point to the correct source data file.

All rows that point to Example1.dbf in the 'Main File' column, should point to the template DBF file corresponding to the source data file. This file will have the source data file imported into it and will then undergo processing, so its structure must therefore match the source data file.

The easiest way to set up a template DBF file is to bring the source data file through the Single File Wizard. After mapping all fields as required, tick 'Create Match Keys' in the Processing Options dialog, and then click on 'More' and 'Save and Exit'.

If the Multi–Level Matching script is to be used more than once on a set of data, it is recommended that the script be cloned first. This way, after processing the data, the script will not need to be changed, and potentially changed back the next time that set of data needs processing. Scripts can be cloned by right clicking on the grid in the Job Editor dialog and choosing 'Clone Job'. The clone should be given a name that relates to the data that it will be processing.

Running the Multi–Level Matching Script

Once the script has been set up correctly, it can be initialized by clicking on 'Start Job' in the Job Maintenance dialog. The script should only ever be started from the beginning, as opposed to resuming it from a specific step using 'Resume Job', which will undoubtedly cause it to fail.

To run the script from the command line, please refer to ['Running a Job Script automatically when you start matchIT'](#).

Layout of Processed Data

When the script has finished running, the processed DBF file will contain new fields grouping the individual, business and address level matches together. These are structured in the same way as MATCH_REF and SET_DUPS.

If a record matches one or more other records at a specific level, the corresponding ...DUPS field will display a figure representing the number of records that the record matched against. If it does not match any records at that level, the field will be empty. E.g. If record A matches records B, C and D at address level, it will contain a number 3 in its ADDR_DUPS field. If it only matches B and C at business level it will contain a number 2 in the COY_DUPS field. If it does not match any of these records at individual level, it will not contain anything in its INDIV_DUPS field.

The ...REF fields indicate which records match which. In the above example, records A, B, C and D would have identical ADDR_REF values. A, B and C would have identical COY_REF values (record A would have its COY_REF field populated with its UNIQUE_REF value) and all of

these records would have different INDIV_REF values (all identical to their UNIQUE_REF values).

The image below illustrates this example:

Address	Company	Address1	Address2	Address3	Address4	Postcode	Indiv_ref	Indiv_dups	Coy_ref	Coy_dups	Addr_ref	Addr_dups
JOHN SMITH	STANTON COPSHAW DIRECT	3RD FLOOR	LOW PROFILE HOUSE	12 NEWHALL STREET	BIRMINGHAM	B3 3ER	0000000001	0	0000000001	2	0000000001	3
M R F BLOGGS	STANTON COPSHAW DIRECT LTD	LOW PROFILE HOUSE	12 NEWHALL STREET	BIRMINGHAM		B3 3ER	0000000002	0	0000000001	2	0000000001	3
SARAH JONES	STANTON COPSHAW LTD	12 NEWHALL STREET	BIRMINGHAM			B3 3ER	0000000003	0	0000000001	2	0000000001	3
MISS A GREEN	FRINTON WILKES PLC	12 NEWHALL STREET	BIRMINGHAM	WEST MIDLANDS		B3 3ER	0000000004	0	0000000004	0	0000000001	3

Further Processing

Upon completion of the Multi-Level Matching script, the processed data can either be exported manually using matchIT's standard Output functions or it can be exported using another job script, which will need to incorporate the program 'OUTPUT.PRG'.

To manually export the data when the script finishes; return to matchIT's main menu. Make sure that the processed table is open in matchIT, then select Output>Output To File.

To automatically export the processed data using a job script, the additional job script will need to be set up before running the Multi-Level Matching script. The user will need to point to 'OUTPUT.PRG' from within the script and need to edit it to ensure that the correct output format, fields and destination(s) are specified. After setting the Output script up, open the Multi-Level Matching script in the Job Editor and tick the 'Run Another Job After This One' box, in the bottom right-hand corner of the screen. When prompted, select the Output script. Now, when the Multi-Level Matching script finishes the Output script will automatically run.

Maintenance

Adding A Custom Weight

If custom weights need to be added, the "3 ADD IND WEIGHT.PRG" program will need editing. The code required to add a custom weight is already used in the program to add a weight on Individual Name. Therefore, this existing code can be copied and pasted, and then edited to look at the field in which the weight is to be added.

An example of the code required, if a weight on Email were to be added is as follows:

```

SELECT WEIGHTS
GO TOP
REPLACE EMAIL WITH 60
SKIP 1
REPLACE EMAIL NAME WITH 40
SKIP 1
REPLACE EMAIL NAME WITH 25
SKIP 1
REPLACE EMAIL NAME WITH 15
SKIP 1
REPLACE EMAIL NAME WITH 25
SKIP 1
REPLACE EMAIL NAME WITH 0

```

```
SKIP 1  
REPLACE EMAIL NAME WITH 1  
SKIP 1
```

This code should be inserted between the following existing lines of code:

```
#ENDIF  
DO UseTable WITH "PARAMS", "P", "", 1
```

Adjusting the Minimum Score to Report

To adjust the minimum score to report, from within the Job Editor screen double-click on the 'Options' cell of row 6 (where the 'Match Keys' cell is set to 'Change'), then when prompted; set the 'Setup Option' drop-down to 'Change' and click on 'Continue'. The main options for this row will now be displayed.

From within the 'Matching' tab of the options, set the 'Minimum Score to Report' setting to the desired score. Please note; this is set to 50 by default, to ensure that the Address level matches are found as well as the business and individual level matches.

Permanent Register of False Matches

Given unchanging unique reference numbers for a file or for two files being matched, if the user flags a pair of matches interactively as being a false match, the pair of references will be stored in a register. On subsequent matching runs using the same files, the same pair of records, based on their unique reference numbers, will not be reported as a matching pair. The user will be able to reset the register completely, or search for a pair of refs and remove them from the register. The register will be kept in the same folder as the relevant Matches or Merges file.

How to Use the Register of False Matches

To use the false match register, set the Log False Matches option in Matching options before or after finding matches/overlap, then flag false matches using Verify Matches (pairs or sets) or Verify Overlap. The unique reference numbers for each pair of records flagged as a false match are written to a false match register, which is a DBF file with:

- the name of the Main File followed by "_Screens.MDF" for Find Matches
- the Second File followed by the Main File with an MDF extension for Find Overlap (this file is kept in the same folder as the Second File).

Next time the user finds matches or overlap on a file in the same folder, matchIT will not report any pair of records as a match where the unique reference numbers of these records are recorded in the appropriate false match register. To ignore the false match register, the user can set the Log False Matches option off. The false match register can also be browsed from the View Table option in matchIT and individual pairs of references deleted, or the whole register can be deleted.

Merge/Purge

Introduction to Merge/Purge

This section is only applicable if you have matchIT Plus or above.

The most typical use of Merge/Purge processing is when you have a file of existing customers and also an external list of prospective customers. Typically, you want to write to all the new prospects, but want to be sure you do not inadvertently send the same letter to any of your existing customers. In this case, you need to locate any of your existing customers that happen to be on the new list, and "purge" them from it.

If, on the other hand, you do want to send the same letter to all existing customers and prospects as well, what you can do is to create a new file (or table) by "merging" the new list and your file of existing customers, eliminating (or not creating), any duplication. These two operations have much in common, and in fact when merging, matchIT first purges records from the new file and then merges the remainder into the Main File. Thus purge is the same as merge, but stopping short of the final stage; no merging takes place.

Each input file must have been Imported into a matchIT Main File (using the Setup Wizard or Import records options) before you can do Find Overlap successfully.

You do not have to Find and Delete Matches from each individual file before running Find Overlap, but you must do so if you want the internal duplicates in each file removed!

The Basic Merge/Purge Process is as follows:

- Find Overlap.
- View/Verify the Overlap to check the matches found.
- Merge or Purge (for a suitable threshold score).

Note You do not have to Find and Delete Matches from each individual file before running Find Overlap, but you must do so if you want the internal duplicates in each file removed!

File Layouts when Merging Files

Before merging two files, the two Main File Layouts should be checked to pre-empt problems later on e.g. has one file got more address lines or wider fields? If so, make sure that the Main File is the one with more lines or the wider fields. If necessary, you should use [Main File Layout](#) from the Jobs/Setup menu to add or widen fields in the Main File.

If you are using the [Multiple File Wizard](#) to merge files, the wizard creates a master layout for you which preserves all of the data from the individual files i.e. it is a superset of all the individual structures.

The Main File is the first file you select. Purge Records does not change the Main File, but removes records from the Second File. Merge Files adds unique records from the Second File to the Main File.

Unique References

If you let matchIT allocate Unique References when the files were originally imported, you must make sure that the Unique References don't overlap between the files. To ensure this, you can set the Next Reference Number (in Matching Options) before Importing the second file, to a value at least greater than the number of records in the first file. Alternatively, you can set it to zero if you want matchIT to prompt you for the starting Unique Reference whenever you Import a file. If your Unique References are not unique between the two files, you can use Generate Unique References in the Fields menu in Tools/Database Utilities to regenerate them in either file or in the merged file.

If you are using the [Multiple File Wizard](#), the wizard does this for you.

Find Overlap

Find Overlap matches the records from one Main File against records with the same key from another file. You can then view a report of the results and choose which records to merge or purge, individually or by a range of the scores. If you have several files to merge, you must merge each one at a time into the Main File, use Job Scripts or the Multiple File Wizard. If you want to remove internal duplicates in the files being merged, you must find and delete matches from each file individually, before running Find Overlap on the two files.

If you are using the [Multiple File Wizard](#), the wizard does all this for you.



Find Overlap

Obviously, to Find Overlap, two files must be open. If this is not the case, matchIT will prompt you for file names when "Find Overlap" is selected (from the toolbar or Merge/Purge menu).

Verify Overlap

As with **Verify Matches**, this can be selected straight after finding the overlap or from the **Merge/Purge** menu.

The screen displayed is the same as that for **Verify Matches**. For details see "[Verify Matches](#)". If the two files have different layouts, the fields displayed for each record may be different. You can use the **Change Fields** button to change the order in which the fields are displayed, to help you compare the two records more easily.

Merge Files

When selecting Merge Files, you can enter the highest match score which you want to merge records for. If you enter zero, only those records on the Second File which were not given a Matching Score will be merged into the Main File. If you enter 100, only those records on the Second File which were given a Matching Score less than 100 in the MERGES table will be merged. If you enter all nines, or if the MERGES table is empty, all records on the Second File will be merged.

Flag Records

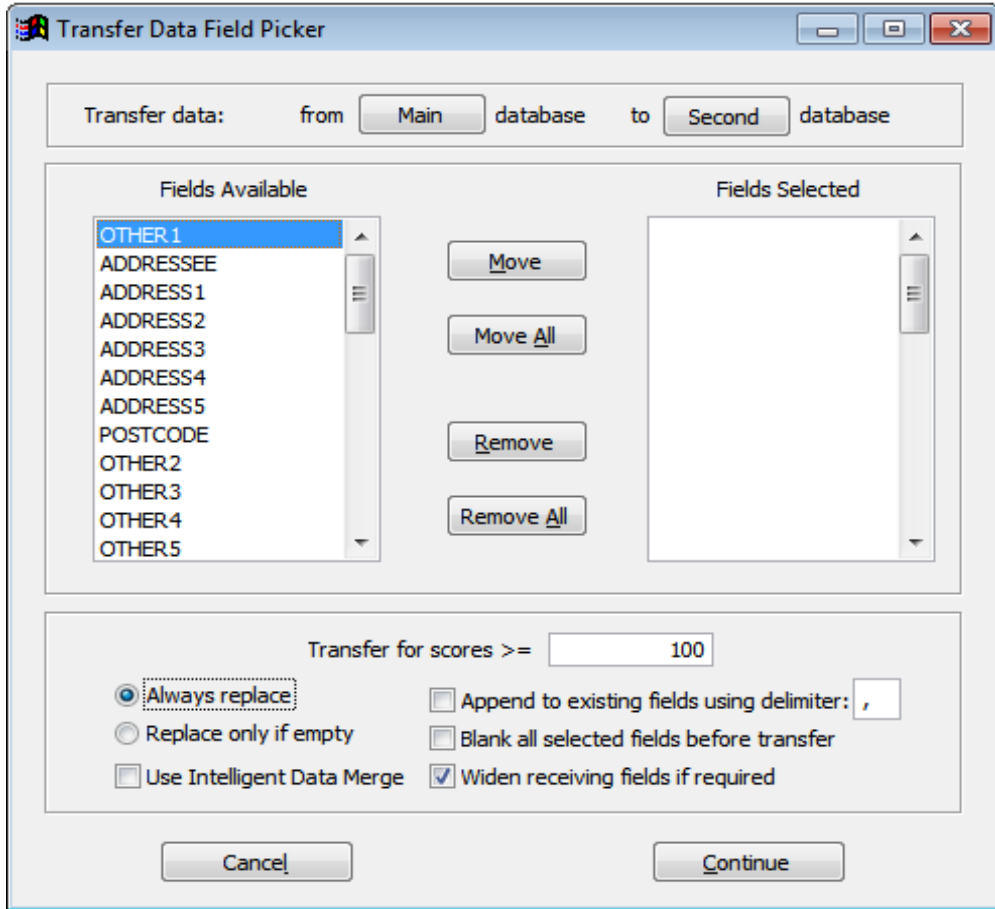
If you select Flag Records, you can enter the lowest score which you want to purge records for. If you enter zero, which gives the highest possible number of deletions from the Second File, all those records on the Second File which were given a Matching Score in the MERGES table will be purged from the Second File. If you enter 100, all records on the Second File which were given a Matching Score greater than or equal to 100 in the MERGES table will be purged. If you enter all nines, or if the MERGES table is empty, no records on the Second File will be purged. Finally, the Second File is selected as the Main File in use, to enable you to go straight to the Output menu without having to remember to select the right file first.

Transfer Data

This option in the Merge/Purge menu allows you to transfer data (such as telephone numbers, company data and geodemographic codes) from a master file to a customer file. You must run Find Overlap first.

The steps for this process are:

- Open your Main File and your Second File and run "Find Overlap" (from the Merge/Purge menu).
- Select "Transfer Data" (also from the Merge/Purge menu).
- Modify matching scores or click "Continue" (click Continue if unsure).
- The following screen will appear:



Data can be transferred between any fields which the Files have in common and these are shown in the left-hand panel. If you wish to transfer data from a field not listed, you must first use "[Main File Layout](#)" to add fields as necessary.

Either double-click or single-click and select "Move" or "Remove" to move or remove fields from the available list to selected field list or back.

Below the field picker there are other options can be set:

- **Transfer for scores** – data is only transferred for records whose matching score is equal to or greater than the value shown.
- **Transfer data** – from Main to Second shows where the data will be copied from to. Clicking on one of the buttons (main/second) will swap the order.
- **Always Replace/Only if Empty** – If there is data in a field that is about to be overwritten, matchIT needs to know whether to replace it (always replace) or leave it (replace only if empty).
- **Blank All Fields/Append to Existing Fields** – You can optionally choose to blank all the fields you are transferring to before starting, or append the data being transferred to that already in the field.
- In all cases, you should ensure that the field being transferred to is large enough to contain all the data or some of it will be lost. To make sure that only the best match is used to transfer data across where many records match one, define a field MATCHSCORE (numeric 8) in your receiving file, using "[Main File Layout](#)".
- Click "Begin Transfer" to start the process.

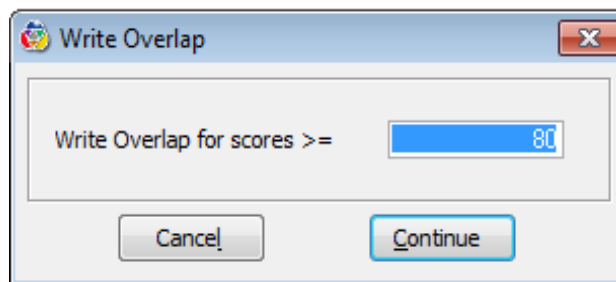
- matchIT will select this new table as the current one and a summary screen will be displayed.

Write Overlapping Records

This option on the Merge/Purge menu allows you to write overlapping records (after Find Overlap) from the **Main File**, to a new file e.g. to mail multiple buyers.

The steps for this process are:

- Open your Main File and your Second File and run "Find Overlap" (from the Merge/Purge menu).
- Select "Write Overlapping Records" (also from the Merge/Purge menu).
- Modify matching scores or click "Continue" (click Continue if unsure).
- A further window will appear, from which you select the minimum score for writing out the records. The default (as for Find Overlap) is to output records with a matching score greater than or equal to the [Minimum score to report](#). Click "Continue" to continue.



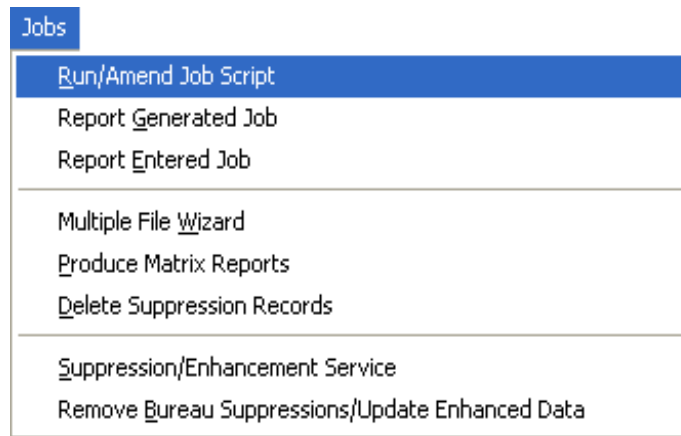
- You will then see window that allows you to either output the "**Overlapping Records**" or to access the "**QA Dashboard**". Select the "**Overlapping Records**" option and you will see a new window that will allow you to specify your new files layout.
- Select **Generate Output**, once your options have been specified, to begin the operation. You will now be prompted for a file name and location.
- matchIT will select this new File as the current Main File and a summary screen will be displayed so you can go on to produce output, do a Mailsort or return to the main menu (the **Done** button).

Job Scripts

Job Scripts Location

This section is only applicable if you have matchIT **Pro**.

To access the job script options, you can go to the *Jobs* menu, followed by *Run/Amend Job Script*:



Alternatively, you can choose the Automation Wizard icon from the Wizard Pane.

Run a Job Script

You can also run any job by specifying a job name as a parameter of the matchIT program icon.

Job Scripts Overview

The Run/Amend Job Script option allows you to specify, run, clone and amend standard jobs consisting of multiple Import, Find Matches, Delete Matches, Find Overlap, and Merge/Purge steps. This option also allows you to specify an unlimited number of files to merge, with a pecking order, and any number of suppression files to compare the merged file with. You can also run FoxPro program files (either compiled FXP files or simple series of interpreted commands in PRG files) as part of the script, for example to copy a file, replace data fields etc.

Job scripts are very flexible and powerful automation tools for matchIT processing. Job scripts don't let you cut corners – they just allow you to repeat things easily. You still have to do the same amount of work specifying file names, Match Keys, deletion scores etc. – but with job scripts, once that is done, you can use that script again any number of times to repeat processing without having to specify it again. If you are not already fully familiar with the workings of matchIT, we strongly suggest that you become familiar with the normal menu-driven Import and Matching functions before you try and set up a job script. Once you have done this, the Multiple File Wizard is the easiest way to set up a multiple file job script and is also easier to use than the Merge/Purge menu options.

Job scripts may look complicated, but if you read and understand the information given here, setting them up and using them should be quite straightforward.

Job Maintenance

Selecting the Run/Amend Job Script option will bring up the Job Maintenance Screen, from which you will be able to create, delete or run job scripts:

The main fields on this screen are *Job Reference*, *Job Description*, and *Main File*, which are explained below:

Job Reference

The job reference is your identifier by which you define the job. matchIT also uses the job reference as a unique identifier for the job, therefore you cannot have two job references the same.

Job Description

The job description is an optional descriptive field to enable you to more clearly describe the job in question.

Main File

This field specifies the Main File for the job. The Main File is the first DBF file in your list of files, and it is the one which the other files are merged into (or the one Suppress files purge from). This is the file that will contain the results of any merge/purge processing when the job is complete.

You can choose any job by choosing from one of these three popups. If you choose a job, the other fields will be automatically updated to reflect your change.

Running and Resuming a Job Script

Below the main panel listing the available jobs are three buttons: **Start Job**, **Resume Job** and **Cancel**. Select **Cancel** to return to the main menu without running a job. Any changes you have made to the job scripts will be remembered. Select **Run** to actually start the selected job script.

Select **Resume Job** if you have had to interrupt a job script whilst it was running, and now want to resume from where you left off. Choose the step from which you wish to resume – it will default to the step which was last run, which is obtained from the Performance log (which you can view via the View menu, Performance Data, All Runs). Note that "step" does not mean line number of the job script; a single line may include, for example, one Import step, three Find Matches, two Find Overlaps, one Merge Files and one Purge Records.

Now we have explained how to actually choose and run a job script, we'll explain how to create them in the first place.

Creating a Job Script

To the right of the main panel are the buttons associated with editing the job scripts. To create a NEW job script, click on the New Job button.

You will now see a small window asking you for a new reference. Type in something here which will be the name of the job script. We suggest that you call it something descriptive. The only limitation on this name is that it must be a name you have not used before (i.e. it must be unique).

You will now see the Job Editor Screen, which is described below.

Additionally it's now possible to automatically generate a job script at the end of Wizard Processing using the Save Job button which appears on the Wizard Processing Complete window. You can also use the Job Overview report to check that the automatically generated job contains all the processing steps that you're expecting.

Modifying a Job Script

At the Job Maintenance screen, you can choose to edit an existing job script (instead of creating a new one which is described above). To do this, first choose the job you want to modify from the list of jobs available, then click on the Modify button on the right hand panel.

Whether you have chosen to modify a job, or create a new one, the next screen you will see is the **Job Editor**:

The screenshot shows the matchIT Job Editor interface. At the top, there's a 'Job Reference' field containing 'TEST' and a 'Description' field. Below this is a table with the following columns: Source File, Main File, Priority, Options, Match Keys, Overlap Keys, and Flag Score. The first row of the table contains the values: (empty), (empty), 1, As Is, As Is, As Is, and 80. Below the table, there's a 'Job Options' section with two checkboxes: 'Merge Databases?' and 'Run another job after this one?'. At the bottom of the window are 'Cancel' and 'Save' buttons.

Explanation of Job Editor Layout

The main concept behind the job editor is that it is designed to represent a list of files to be processed. Each line will correspond to the processing done on one file. The processing is generally done in left-to-right, top-to-bottom order (like reading a book). Processing may include importing a source file (into a predefined Main File layout), followed by internally deduping it, followed by finding its overlap with the master file (the one at the top of the list), and the purging of duplicate records from the file, or merging the records into the master file.

Therefore, the columns correspond to these processes – first you have the **Source Name**, which will be the file name of the source text file, followed by the **Main DBF**, which will be the Main File layout that the data is imported into. This is followed by the **Priority** column, which indicated the files relevant priority in the list (low numbers = high priority). Next, we have the column for import & matching configuration, **Options**, and then columns for internal deduplication (**Match Keys**) and then finding overlap between two files (**Overlap Keys**). Finally, we have a column for the **Flag Score** to be used for processing.

In terms of file order, the first file is the **Master file**. This is the file that each find overlap is done against. Also, if files are merged, they will be merged into this file. This file will also be the file that the Mailsort is done on at the end of job script processing if you have this option enabled.

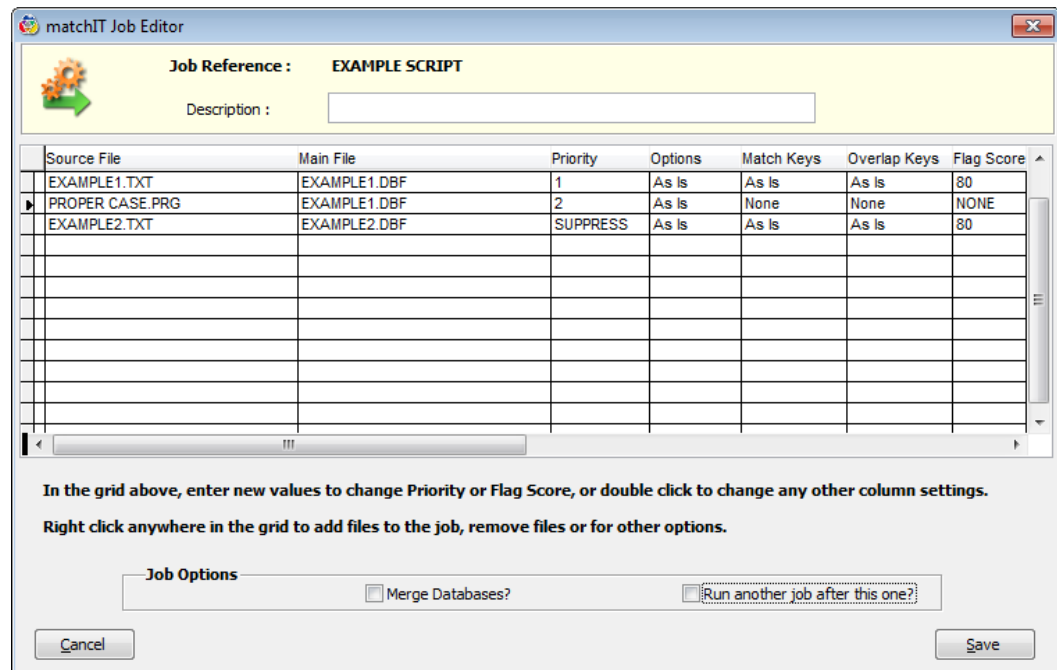
The files that follow this will be **Merge/Purge** files. Each of these files can be imported and internally deduped according to how you set up that line of the job, and then will be compared with the master file. (Note: they will NOT be compared to each other). These files will then be purged of the overlapping records, or merged into the master file.

Following this comes **Suppression** files. These files can be imported, deduped and compared to the master in the same way as the Merge/Purge files. However, these files are special in that they contain **exclusion records**. That is, when the overlap is complete, the records will be removed from the master file, not the secondary file (which is the case if you select Purge Records from the Merge/Purge menu). Files such as the MPS (Mailing Preference Service) file are suppression files.

You can also add bespoke program files to the job scripts at any point. These files are not imported or processed in any way, but contain FoxPro program code. They can be used to insert special programming steps and options into the job scripts which would not normally be possible.

A good understanding of the FoxPro programming language is normally required to create and use these kinds of files.

Therefore, a common job script could look like this:



The following sections will explain the columns and settings above in more detail.

Adding and Removing Files (Rows)

To add or remove a merge file or a suppression file, you must *right-click* the mouse in the file listing part of the window, to see the menu. If you are removing a row that already exists, you must select that row by *left-clicking* on it first. Note that when you start editing a new job script, matchIT will automatically add a row for you.

To add a merge/purge file, click on the **Add Row** option. This will add a new blank row at the bottom of the list. Similarly, you can add a **Add Suppression Row** with the equivalent option. Note that when suppression files are added, they are always added to the bottom of the whole list, whilst merge/purge files will be added to the end of the merge/purge list only (i.e. before suppression files).

If you want to remove the currently selected row, click on **Delete Row**.

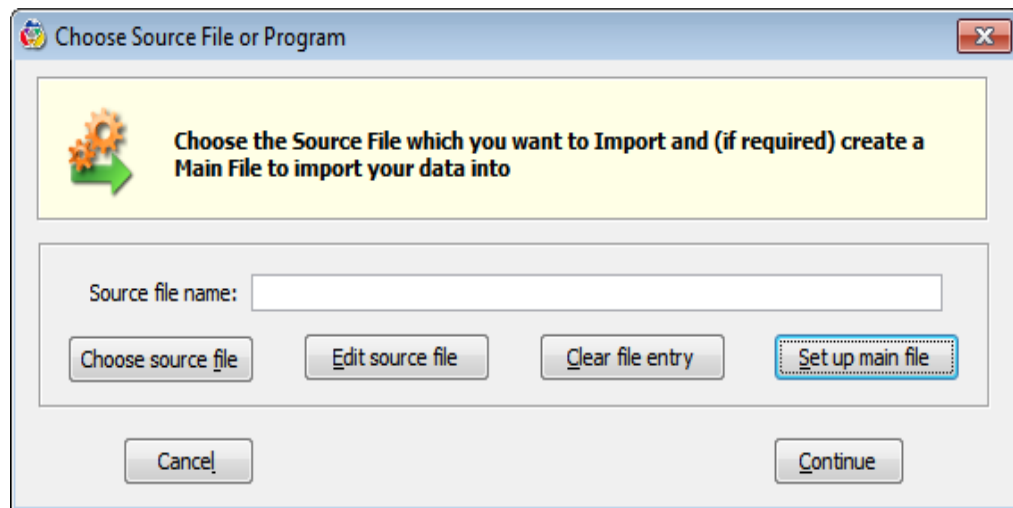
With this menu, you can also **Rename Job** (click on it and it will ask you for the new name – the same naming conventions apply as when you create a new job script). Furthermore, you can also **Clone Job** (copy the current job). When you do this, matchIT will again ask you for the new job script name. Note that when the copying of the job has been done, the job you will be editing will be the new job.

Explanation of Columns

Source Name

This column specifies the file name of the original data – the data before you have done anything to it. This is the file which will be imported into matchIT.

If you double-click on an entry in this column, you will see the following screen:



You can either type directly into the field to change the file name, or you can click on the Choose source file button to choose another one. Click on Edit source file to view (and perhaps change) the data file.

Special Cases

There are two special uses for this screen that the user should be aware of:

- If you choose a file with extension **.FXP** (a Visual FoxPro compiled executable file) or **.PRG** (a text file which contains a FoxPro program – see later for more details), then this file will not be treated as an import file, but as an **executable** program file. This means that matchIT will not process the data in the file, but will attempt to run it instead. In this case, all the other columns in the row are irrelevant, and will be ignored by matchIT. Note that compiled Visual FoxPro programs must be compiled using the same version of Visual FoxPro as your version of matchIT – you can ascertain this via the Help menu, About matchIT.
- If you have an import format other than EXT or Regenerate Keys (see Setup below), and the source file name is blank, then matchIT will not do any import processing on the file. matchIT will assume the file has already been imported, and will not try to do so again. In the case of the EXT format, the source file should **always** be empty. (This format

means do the **generate keys** step only – don't add records from a source file previous to this). For more information on this format, please consult the Import Options section.

Main File

This column corresponds to the Main File that will contain the data after it has been imported. To choose a file for this, just double-click on the field, and matchIT will ask you for a file name.

Note that the file must exist before the job script is run – the job script cannot automatically create Main File layouts. The File can of course be empty. When the job is run, any data in this file will be over-written by the data in the source file.

Priority

The priority of a file corresponds to its place in the processing order. The lower this number, the more important a file is. The file with the highest priority (usually 1), will be at the top of the list.

This file will be the Master File, with which all other files are compared, and into which files can be merged.

Priorities are automatically assigned when you add merge or suppression files, in the order that they were added to the job. You can change any of these priorities by typing into an appropriate number into this field. This field supports decimal numbers if necessary.

For suppression files, these will have the priority set to "SUPPRESS". You can make a merge file a suppression file by typing in the word SUPPRESS into this field. Similarly, you can turn a suppression file into a merge file by typing a number into this field.

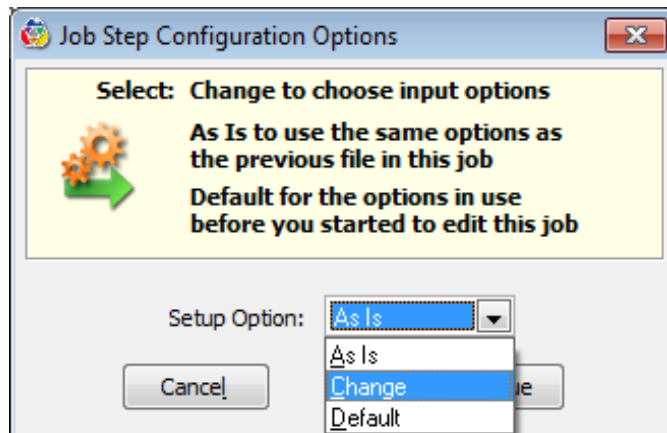
Suppression files do not have priorities amongst themselves, as they only act to remove records from the master file (when a record is removed from the master file, it doesn't matter if suppression file A or suppression file B removed it – the result is the same).

If you blank out the priority field, this will be treated as priority zero by matchIT. If you have two files with the same priority, the order they will be processed in will be the order that they were added (i.e. the one you added to the job first will be processed first).

Options

The *Options* column is where most of the matchIT processing options are set. These include options such as operation parameters and Import Options – please consult the matchIT Options section for more information on the options available.

Double-clicking on a row in the Options column will give you a choice of three options:



Change

Select *Change* to view the standard matchIT Options screen (with a couple of tabs that do not relate to job script processing removed). From here, you can change processing options as required.

As Is

This option has two slightly different meanings, depending on whether it is chosen for the Master File or any other file.

If *As Is* is chosen for the Master File, this means that the matchIT options chosen will be the same as the current configuration. (Check this via the Jobs/Setup menu, Options before starting the job script).

If *As Is* is chosen for any file other than the first one on the list, the job script processing will take the matchIT configuration from whatever was set up in the previous line in the script. (That is, it remains unchanged).

Default

Whenever this option is chosen, the job script processing will take the configuration from the current setup of matchIT. (Note that this has the same effect as *As Is* for the first file in the list).

Notes

One pitfall for the unwary in job script configurations is the *generation of unique reference numbers*. As has been stated elsewhere, it is vital that within a single file, all unique reference numbers *remain unique*. This is simple within only one file, but when you are cross matching and merging two or more files together, then maintenance of the reference number becomes more complicated.

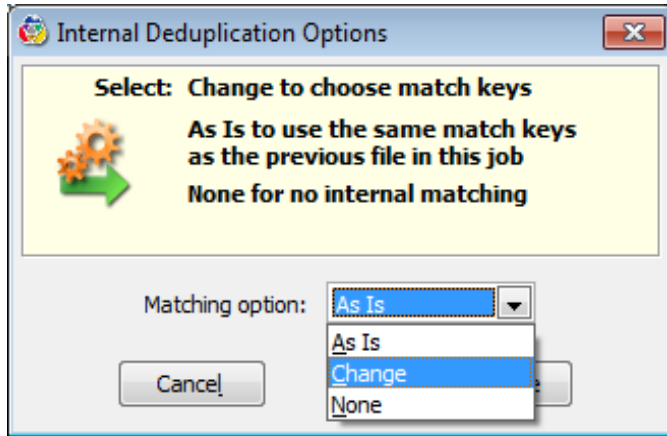
One way to resolve this problem is to assign a new unique reference starting number for each file that is being imported. You can do this by setting the *Options* column to *Change* for every file that is being imported, and by manually setting the starting reference number in the matchIT options for each file. Alternatively, if you set the job script up using the Multiple File Wizard, it will ensure that the unique references are really unique across all the records in all the files in the job – otherwise it will regenerate them starting from 1.

Another feature of the job script processing that can be used is the *Input Format* option. As mentioned above, if you set this to anything except *EXT*, and have a blank *Source File* name, then no import processing will be done. This can be very useful for quicker processing of files that have already been imported. Furthermore, if you do not want to add new records into a file, but just want to regenerate the matchIT fields, you can set the Input Format to *EXT*.

Match Keys

Match Keys are used for the internal deduplication step of matchIT. As with normal use of matchIT, you should specify a set of Match Keys in order to carry out the deduplication. This corresponds to the Find Matches menu option.

In a similar way to the Setup column, double-clicking on this field will show you an options screen:



Change

This option works in an equivalent way to the Change option in the Setup column. Choose this option and click on Continue to go to the Match Keys screen where you can edit the Match Keys that will be used in the find matches step in the job.

As Is

Again, this works in a similar way to the As Is from the Setup column. Selecting it means that the Match Keys used for this file will be the same as for the previous file in the list.

Note that this option does not apply to the first file in the list.

None

If you select this, then no internal Find Matches steps will take place. Use this for files that have already been deduped by matchIT, or files which do not need to be cleaned.

Setting the options in this column will only cause matches to be **searched for**. If you want to actually delete the matches as well, you must set the Deletion Score to a non-zero value.

Overlap Keys

This sets the keys that will be used to find overlap between the master file, and the current file.

This works almost exactly the same way as the Match Keys option works.

The only real difference is that the first file can only have this set to None, as it can't find overlap with itself.

As for the Match Keys, this will only **search for** the overlap, it will not actually process the results – so if you want to merge the file with the master file or purge records from this file, set the deletion score column to the appropriate score value.

Deletion Score

This determines the score at which a potential match is considered to be a true match. It is used in two ways. Firstly, for internal deduplication, this is the threshold score for deleting records.

Secondly, when a Find Overlap is carried out, this is the threshold for purging records (usually in preparation for merging them into the master file).

With the master file, this score only refers to the deletion threshold for internal duplicates.

If you do not wish records to be deleted, set this value to zero (0) or "NONE".

Other Job Script Options

Merge Databases

If you check this option, each file after the first one will be merged with the first file. Records that have been found to overlap with the master file (via the Find Overlap steps) will not be added to the master file.

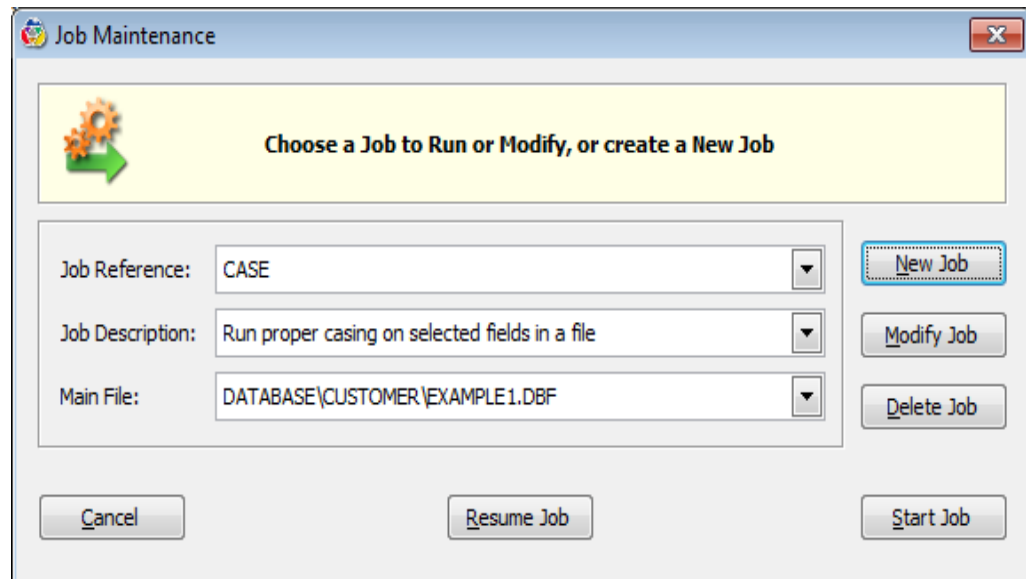
If you set this option off, then the overlapping records in the "merge files" will be purged according to the deletion score in each file, but the file will not be added to the master file. Note that if the deletion score is set to zero or NONE, then records will not be purged either.

Note that the Multiple File Wizard is an exception for use of this option, as it always merges the files into the master file irrespective of whether this option is set on.

Run Another Job At End?

Sometimes, you may wish to link more than one job together. This is especially the case when running small program files, or when you want to merge files into multiple master files. In all cases, the first job will be totally complete before any part of the next job is started.

To enable this option, click on the check box. You will be presented with a job script picker screen like this:



To run another job at the end of the current job, just choose the new job from the list available. Once you have chosen the job you want, click on the Continue button to confirm the choice.

If you don't want to run a job at the end, click on the Clear button. This will tell the job script processing NOT to run a job at the end of the current one.

Click Cancel if you are happy with the current state of this option, and don't wish to change it.

Running a Job Script automatically when you start matchIT

You can run a job script automatically when matchIT starts by modifying the properties of the matchIT icon so that after the *Target* you add /R: followed by the job script name e.g.

```
"C:\Program Files\matchITv6\matchit.exe" /R:jobname
```

where **jobname** is the reference of the job script. To quit matchIT automatically at the end of the job script, you have to run a program at the end of the job that simply contains these commands:

```
on shutdown && this stops matchIT asking if you want to quit matchIT  
on next command
```

```
quit && Quit matchIT
```

However, if you want matchIT to automatically close on the job completion and remove any Temp files that were created your close script will contain the following:

```
DO UseTable WITH "PARAMS", "P", "", 1
```

```
lcCleanup = p.do_cleanup
```

```
replace p.do_cleanup with "YES" && set to cleanup temp files without  
asking
```

```
do cleanup
```

```
DO UseTable WITH "PARAMS", "P", "", 1
```

```
replace p.do_cleanup with lcCleanup
```

```
on shutdown && this stops matchIT asking if you want to quit matchIT  
on next command
```

```
quit && Quit matchIT
```

Running Programs

Programs ran in Jobs Scripts do not need to be compiled, so they can be edited (compiled programs cannot be edited).

- When referencing source files and databases, programs can:
 - o Work with databases and source files that have been preset in the job script.
 - o Prompt for a database or source file to use.
 - o Have hard coded database and source file names embedded in the program.
 - When using IF/ENDIF, FOR/ENDFOR you need to use start the loop with a hash (#).
 - If you are selecting a database that is set as the Main File, the program should start with SELECT CLIENT_DB. This opens the database.
 - A double ampersand ("r;&&") or a single asterisk ("r;*) represent a comment. Lines that start with these are not processed in FoxPro.
 - o You can add a comment to explain what a line does. This is usually done by adding && e.g. "r;REPLACE ALL TELEPHONE WITH "r;1234" &&Updates the telephone field"

MENU.PRG

- This program activates the matchIT menus when running a Job Script from a command line.
- Below is an explanation of the main sections for OUTPUT.PRG.
- o The blue text is the code and the black text is an explanation.


```
DO "MATCHIT MENUBAR.MPR"
Activates the menus
DO USETABLE WITH "PARAMS", "P", "", 1
Opens PARAMS.DBF, which stores the options.
SELECT P
Ensures PARAMS.DBF is in use.
```

MAILSORT.PRG

- This program exports a database.
 - Below is an explanation of the main sections for OUTPUT.PRG.
- o The blue text is the code and the black text is an explanation.
o Lines that have been highlighted can be modified to suit your requirements i.e. paths, file and field names

```
M.CRESTOREDIRECTORY = "D:\BACKUP "
```

Sets the directory where you have stored MS_PARMS to (see Setting job script to import then Mailsort and output in Mailsort order. Section of this document for more detail)

Setup &endash;

```
M.CRESTOREDIRECTORY = ALLTRIM(M.CRESTOREDIRECTORY)
```

In case there have been any additional spaces added to the end of the restore directory, they are removed.

```
LCGSREGION = ""
```

Sets the Geographic Sequence region to be blank.

```
#IF RIGHT(M.CRESTOREDIRECTORY,1) # "\
```

```
M.CRESTOREDIRECTORY = M.CRESTOREDIRECTORY + "\
```

```
#ENDIF
```

In case the restore directory path does not end with a back slash, one is added.

```
DO USETABLE WITH "PARAMS", "P", "", 1
```

Activates PARAMS.DBF, in case it's not in use.

```
SELECT CLIENT_DB
```

Opens the matchIT database set in the Main File box, in the Job Editor.

```
OPFILE = STRTRAN(DBF(), ".DBF", ".OUT")
```

Stores the database path and name, substituting the DBF extension with a .OUT

```
DIRFILE = STRTRAN(DBF(), ".DBF", ".DIR")
```

Stores the database path and name, substituting the DBF extension with a .DIR

```
RESFILE = STRTRAN(DBF(), ".DBF", ".RES")
```

Stores the database path and name, substituting the DBF extension with a .RES

```
SUMFILE = STRTRAN(DBF(), ".DBF", ".SUM")
```

Stores the database path and name, substituting the DBF extension with a .SUM

```
CFLFILE = STRTRAN(DBF(), ".DBF", ".CFL")
```

Stores the database path and name, substituting the DBF extension with a .CFL

```
#IF FILE(M.CRESTOREDIRECTORY + "MS_PARMS.DBF")
```

```
#IF USED("MS_PARMS")
```

```
SELECT MS_PARMS
```

```
ZAP
```

```
APPEND FROM M.CRESTOREDIRECTORY + "MS_PARMS.DBF"
```

```
#ELSE
```

```
=SELNEXT(30)
```

```
USE MS_PARMS
```

```
ZAP
```

```
APPEND FROM M.CRESTOREDIRECTORY + "MS_PARMS.DBF"
```

```
USE
```

```
#ENDIF
```

```
#ENDIF
```

The block above locates the MS_PARMS folder you have copied the restore directory. It then adds these details to matchIT's MS_PARMS. This means it's using your required Mailsort parameters.

Do Mailsort &endash;

```
DO MS_RECPS WITH .T.
```

```
DO MSORTSTEP IN MSORTIT WITH .T.
```

The two lines above run the Mailsort step. The .T. means no prompts are displayed that would interrupt the job.

Reports &endash;

```
SELECT MSRUNSUM
```

Opens the MSRUNSUM database that stores the Mailsort figures

```
REPORT FORM MAILSORT\SUMMARYTEXT TO FILE (SUMFILE) ASCII NOCONSOLE  
NEXT 1
```

Sends the Mailsort Summary report to a text file. The name of the text file is stored earlier in the SUMFILE name.

```
#IF !USED("MSORTB2")  
=SELNEXT(30)  
USE GPODATA\MSORTB2  
#ENDIF
```

Ensures MSORTB2.DBF is in use before creating the Direct Line Listings. This database stores Mailsort codes for direct selections, supplied by Royal Mail.

```
SELECT DIR_SEL.*, MSORTB2.LABEL FROM DIR_SEL, MSORTB2 WHERE  
MSORTB2.STD_CODE = DIR_SEL.MS_SELCODE INTO CURSOR DIR_LLST
```

Counts the Direct selections and stores them to a cursor (a temporary table), ready for the line listings.

```
REPORT FORM MAILSORT\DIR_LINETEXT TO FILE (DIRFILE) ASCII NOCONSOLE
```

Sends the Direct Line Listing report to a text file. The name of the text file is stored earlier in the DIRFILE name.

```
USE IN "MSORTB2"
```

Once again, ensures MSORTB2 is in use.

```
#IF !USED("MSORTB3")  
=SELNEXT(30)  
USE GPODATA\MSORTB3  
#ENDIF
```

Ensures MSORTB3.DBF is in use before creating the Residue Line Listings. This database stores Mailsort codes for residue selections, supplied by Royal Mail.

```
SELECT RES_SEL.*, MSORTB3.LABEL FROM RES_SEL, MSORTB3 WHERE  
MSORTB3.STD_CODE = RES_SEL.MS_SELCODE INTO CURSOR RES_LLST
```

Counts the Residue selections and stores them to a cursor (a temporary table), ready for the line listings.

```
REPORT FORM MAILSORT\RES_LINETEXT TO FILE (RESFILE) ASCII NOCONSOLE
```

Sends the Residue Line Listing report to a text file. The name of the text file is stored earlier in the RESFILE name.

```
USE IN "MSORTB3"
```

Once again, ensures MSORTB2 is in use.

Customer Final Labels &endash;

```
SELE RES_SEL.MS_SELCODE+"00" AS MS_SELCODE,  
ALLTRIM(STR(RES_SEL.RBAGS)) AS BAGS FROM RES_SEL ORDER BY  
RES_SEL.MS_SELCODE INTO TABLE RTEMP  
SELECT DIR_SEL.MS_SELCODE, ALLTRIM(STR(DIR_SEL.DBAGS)) AS BAGS FROM  
DIR_SEL ORDER BY DIR_SEL.MS_SELCODE INTO TABLE CFLTEMP  
APPEND FROM RTEMP  
USE IN RTEMP  
ERASE RTEMP.DBF
```

The lines above create temporary tables, that store the Customer Final Label information.

COPY TO (CFLFILE) TYPE DELIMITED

Sends the Customer Final Labels to a comma delimited text file. The name of the text file is stored earlier in the CFLFILE name.

USE IN CFLTEMP**ERASE CFLTEMP.DBF**

The temporary files are then cleaned up.

Output &endash;

SELECT CLIENT_DB

Re-opens the matchIT database set in the Main File box, in the Job Editor.

```
REPLACE ALL MS_SELCODE WITH IIF(RES_SEL = "0", MS_SELCODE,
LEFT(MS_SELCODE,3))
```

Reduces the Mailsort selection codes to three characters, for the residue selections.

*** DO GENERATESEQUENCE WITH MS_PARM.GS_ORIGIN**

If you are using Mailsort/Presstream 1 and want to use Geographic Sequencing, this can line can be enabled by removing the asterisk.

*** SORT on RM_REGION, RES_SEL, MS_SELCODE to MSORTOUT for RES_SEL # "G"**

A temporary table is created (MSORTOUT). It is ordered by the geographic region, by the type of selection (direct or residue) and the Mailsort selection code. It ignores any foreign records (RES_SEL = "r;G"). This line can be enabled for Mailsort/Presstream1 services.

SORT on RES_SEL, MS_SELCODE to MSORTOUT for RES_SEL # "G"

A temporary table is created (MSORTOUT). It is ordered by the type of selection (direct or residue) and the Mailsort selection code. It ignores any foreign records (RES_SEL = "r;G"). This line can be enabled for Mailsort/Presstream1 services. Also, you can include foreign records by by removing "r;RES_SEL # "r;G""

```
=SELNEXT(30)
```

USE MSORTOUT

Ensures the temporary table that was created above is in use.

```
#IF TYPE("SEQNUM") = "C"
```

```
    REPLACE ALL SEQNUM WITH CHRTRAN(STR(RECNO()), LEN(SEQNUM)), " ", "0")
```

```
#ENDIF
```

If you have a SEQNUM field in the database, this is populated. Leading zeroes are added to the field. If you don't want leading zeroes, change the REPLACE line to

```
"r;REPLACE ALL SEQNUM WITH STR(RECNO())"
```

```
FIELDLIST = IIF(TYPE("ADDRESSEE")="C", "ADDRESSEE", "")
```

```
FIELDLIST = IIF(TYPE("JOB_TITLE")="C", FIELDLIST+", JOB_TITLE", FIELDLIST)
```

```
FIELDLIST = IIF(TYPE("COMPANY")="C", FIELDLIST+", COMPANY", FIELDLIST)
```

```
FIELDLIST = IIF(TYPE("ADDRESS1")="C", FIELDLIST+", ADDRESS1", FIELDLIST)
```

```
FIELDLIST = IIF(TYPE("ADDRESS2")="C", FIELDLIST+", ADDRESS2", FIELDLIST)
```

```
FIELDLIST = IIF(TYPE("ADDRESS3")="C", FIELDLIST+", ADDRESS3", FIELDLIST)
```

```
FIELDLIST = IIF(TYPE("ADDRESS4")="C", FIELDLIST+", ADDRESS4", FIELDLIST)
```

```
FIELDLIST = IIF(TYPE("ADDRESS5")="C", FIELDLIST+", ADDRESS5", FIELDLIST)
```

```
FIELDLIST = IIF(TYPE("ADDRESS6")="C", FIELDLIST+", ADDRESS6", FIELDLIST)
```

```
FIELDLIST = IIF(TYPE("ADDRESS7")="C", FIELDLIST+", ADDRESS7", FIELDLIST)
```

```
FIELDLIST = IIF(TYPE("POSTCODE")="C", FIELDLIST+", POSTCODE", FIELDLIST)
```

```
FIELDLIST = IIF(TYPE("MS_SELCODE")="C", FIELDLIST+", MS_SELCODE",
```

```
FIELDLIST)
```

```
FIELDLIST = IIF(TYPE("SALUTATION")="C", FIELDLIST+", SALUTATION", FIELDLIST)
```

```
FIELDLIST = IIF(TYPE("CONTACT")="C", FIELDLIST+", CONTACT", FIELDLIST)
```

```
FIELDLIST = IIF(TYPE("SEQNUM")="C", FIELDLIST+", SEQNUM", FIELDLIST)
```

```
FIELDLIST = IIF(LEFT(FIELDLIST,1)=",", SUBSTR(FIELDLIST,3,999), FIELDLIST)
```

The block above checks if a field is there. If it is, the field is added to the Output Layout i.e. it is included in the output file. You can add or remove lines as necessary.

TIP: to add a line, copy an existing line and paste it to a new line. Then modify it to represent the field(s) you require.

COPY to (OPFILE) type delimited fields &fieldlist

The output file is created. It is sent to OPFILE, which is listed/generated near the top of the program.

Close down -

[ON SHUTDOWN](#)

[QUIT](#)

Once finished, the Mailsort program closes matchIT.

OUTPUT.PRG

- This program exports a database.
- Below is an explanation of the main sections for OUTPUT.PRG.

o The blue text is the code and the black text is an explanation.

[SELECT CLIENT_DB](#)

Opens the database set in the Main File box in the Job Editor.

[OPFILE = STRTRAN\(DBF\(\), ".DBF", ".TXT"\)](#)

Stores the database path and name, substituting the DBF extension with a .TXT

[INDEX ON POSTCODE TAG POSTCODE](#)

Orders the file by the postcode field.

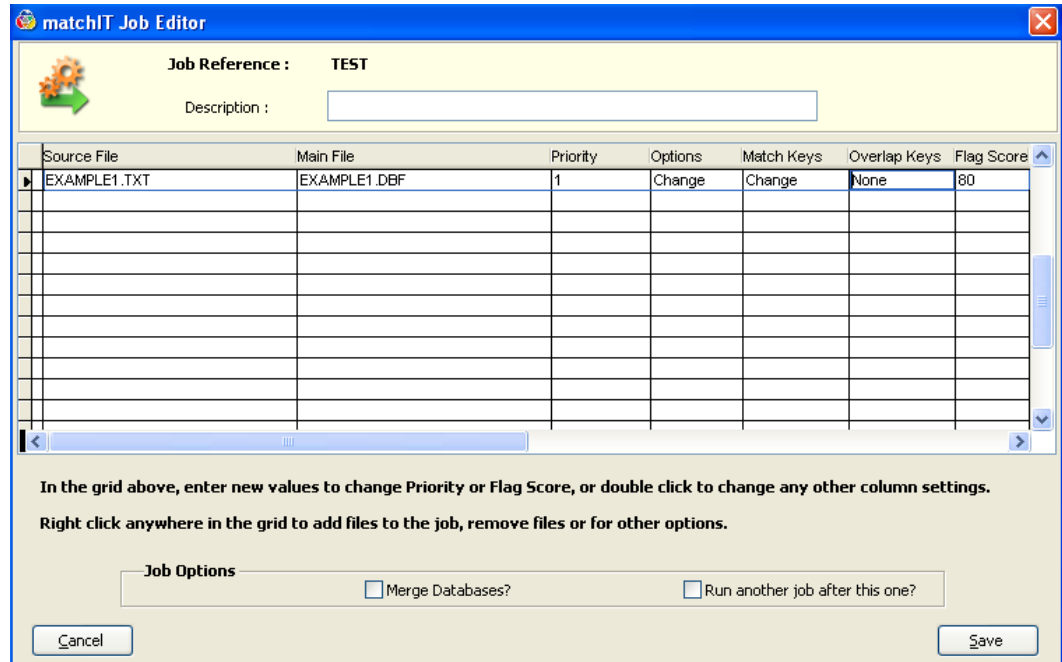
[COPY TO \(OPFILE\) TYPE SDF FIELDS ADDRESSEE, ADDRESS1, ADDRESS2, ADDRESS3, POSTCODE](#)

Outputs the file in Fixed Width (TYPE SDF) format, only including the fields ADDRESSEE, ADDRESS1, ADDRESS2, ADDRESS3 and POSTCODE.

Job Script Examples

Job Script Examples

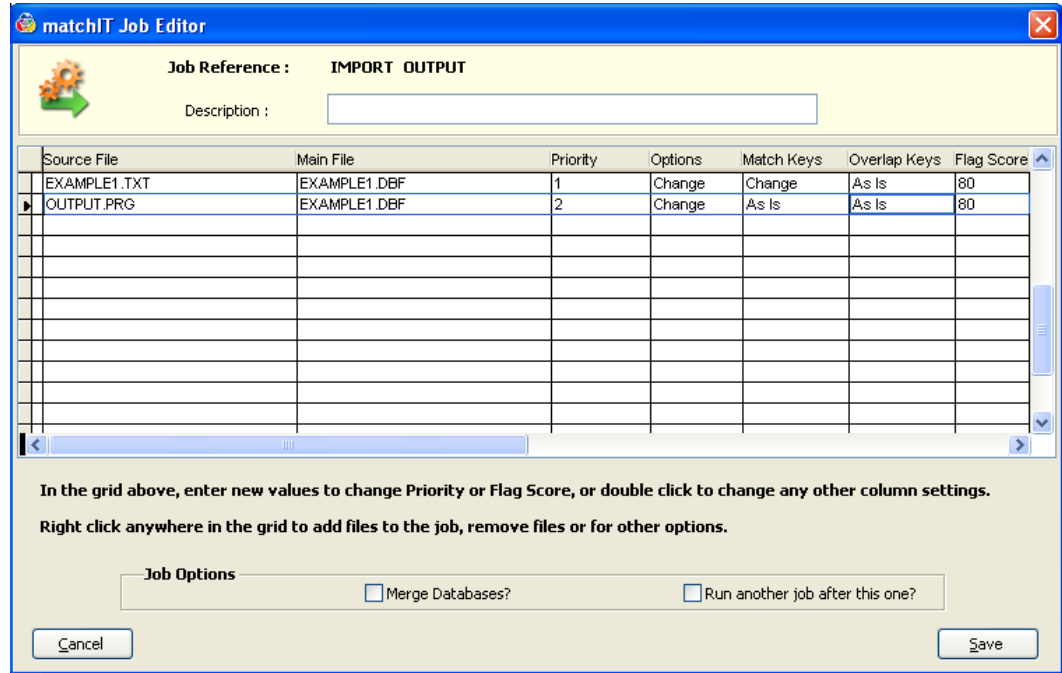
Below is how a simple import and dedupe may look once set up:



You can see that Example1.TXT is being imported into Example1.DBF.

Setting up a simple job script to import and dedupe a file and export it to another file.

Below is how a simple import and dedupe plus an output (NOT in Mailsort order) may look once set up:



Once the import and dedupe have finished, the Output program kicks in you will see the Options, Match Keys and Overlap Keys have been modified. The options have not been modified, just checked. It is always worth doing this for safety purposes.

The Match Keys and Overlap Keys have been set to NONE for safety purposes.

If you want to, you can also set the Flag Score to 0 (zero/NONE) although this shouldn't make a difference.

See the [Running Programs](#) of this document for further detail on OUTPUT.PRG.

Multiple File Wizard

Preparation for using the Multiple File Wizard

The **Multiple File Wizard** enables you to easily set up a multiple file merge or merge/purge job. Before using the Multiple File Wizard, it saves time if you set the File Locations for the Database and Import directories to those containing the files for the job (from the Jobs/Setup menu, Options.)

There is a limit of 2GB (2,147 Mb) on the size of any Main File.

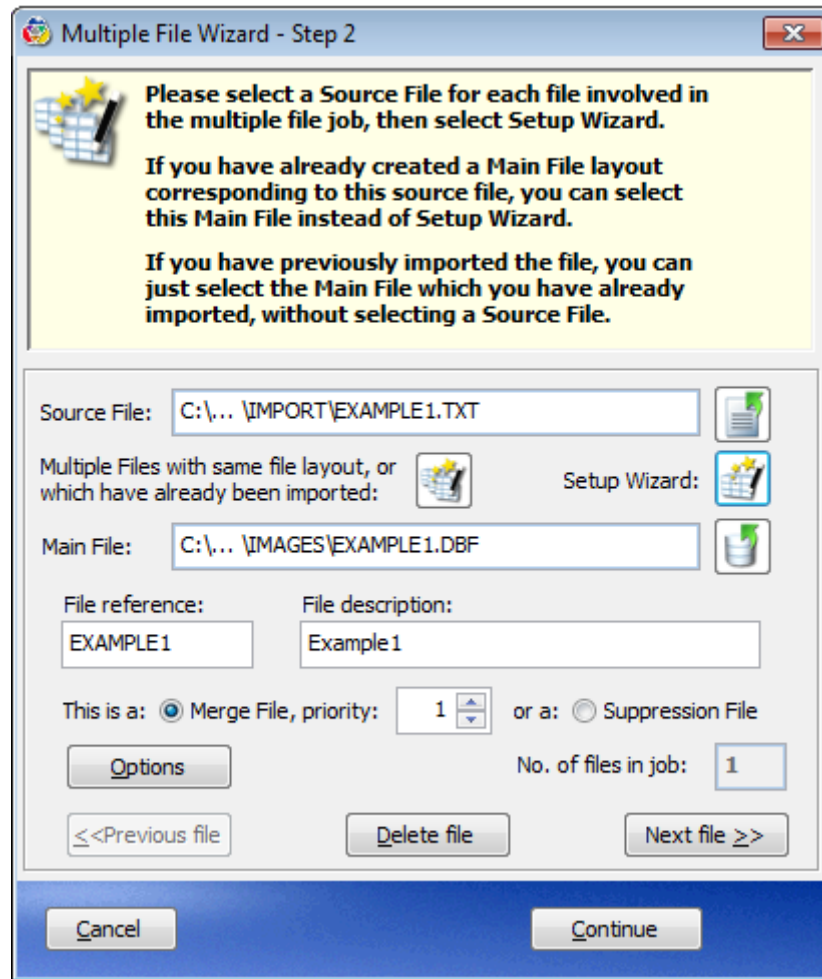
Please note that all the files in the job are merged into a single master file, which the Multiple File Wizard creates, containing all of the fields and all of the records from any file within the job. There is a limit of 2GB (2,147 Mb) on the size of the resultant master file, which in practice could be about 5 million records – the actual number of records depends on the record length i.e. the number and width of fields in the resultant master file layout. If you want to process more records than this, it will usually be because there are some very large suppression files involved. In this case, you should use the Multiple File Wizard for the mailing files and any small suppression files, then use [Find Overlap](#) between the large suppression files and the resultant master file. This also reduces the processing time significantly, because matchIT does not need to process match keys for all of the records within the large suppression files – obviously the Multiple File Wizard does not report internal matches within any suppression file, but it will take significantly extra time if very large suppression files are built into the master file. If you want to use Find Overlap for such a job but still include the suppression files in matrix reports from the job, please consult your support provider for job scripts that achieve this result.

Multiple File Wizard: Step 1

Select the **Multiple File Wizard** option from the matchIT Wizard Pane or from Jobs/Setup, Multiple File Job menu. You will be asked for a Job Reference, and a Job Name for the resultant reporting. After you have entered these details, select Continue.

Multiple File Wizard: Step 2

Then you will get the options to configure the first file:



For each file, perform the following steps:

- Select the source file that you would like to use. If the file has already been imported into matchIT, there is no need to specify a source file.
- If the source file has been imported into matchIT specify that DBF as the Main File. If you have a "shell" DBF to import your source file into, specify that DBF as the Main File. If you do not have a DBF, you can use the Setup Wizard button to create a "shell" DBF for importing. When using the Setup Wizard option the DBF that is created will automatically be set as the Main File.

If you have several files with the same "exact" layout, you can utilize the "Multiple Files with same file layout.." button. From the next window, you can specify either several source files or several DBF's that have already been imported. You can also specify the priorities and Suppression files from this window.

- Select Options and set the Input Format to the format of the source file e.g. SDF for fixed width files with Carriage Return, COMMA for comma delimited.
- You can also change any of the other Input Options e.g. Proper Case Incoming Data, Postcoding.
- If the file is a suppression file, select the Suppression File radial. If it is not a Suppression File, make sure the priorities are as you want: 1 is the highest priority i.e. the file for which you most want to keep records where they match records on another file.

If you enter the highest priority file first and then in order of priority, the priority defaults to the right value.

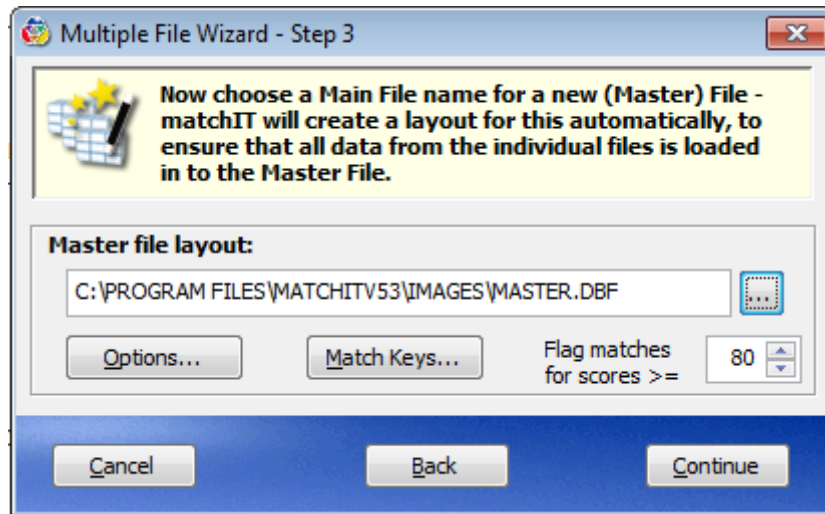
- In the Options menu, under the Matching tab you can select the option "Allow equal file priority in multiple file jobs?". This option will allow matches to be flagged randomly in files of equal priority and not according to the order that the files were loaded.


If the file already has list codes and priorities in, these will be disregarded. If they are labelled LISTC and LISTP, they will be replaced by the list code and priority you enter on this screen.

After you have selected all the files, select Continue.

Multiple File Wizard: Step 3

You will then see the window below:

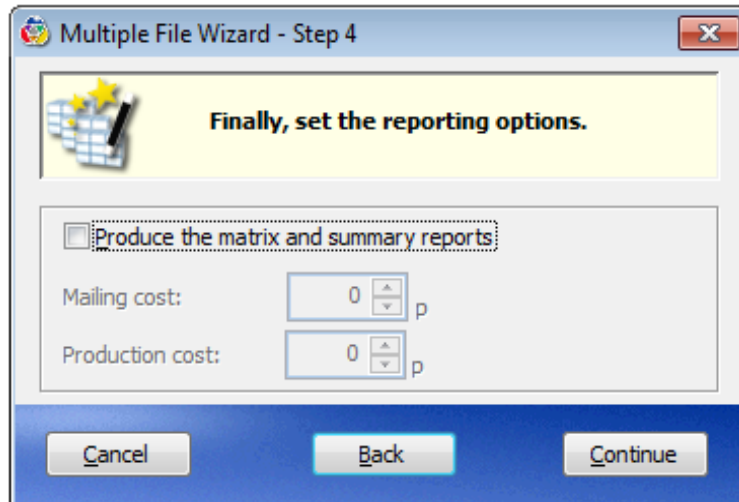


Click on the file selector button  and enter a name and path for the Master file. matchIT will create a merged table layout with all the fields from all of the individual files, with the maximum field width from each file. All input files (including suppression files) are merged into the Master File. Each file is automatically given a list code reference (in the LISTC field) so splitting out the non-duplicate records from each original file is possible after the job. You are prompted to remove the Suppression records at the end of the job.

Then choose the Match Keys that you want to use, as for Find Matches. You must also enter a deletion score so that the job will automatically delete the matching records (as in Delete Matches).

Multiple File Wizard: Step 4

Finally, you will see the screen below:



If you want the matrix and summary reports produced, check the option shown and enter the costs.



Run/Amend Job Script

You will then be prompted as to whether you want to run the job immediately.

Whether you do or not, you can amend and run the generated job at any stage from the Run/Amend Job Script option on the matchIT Jobs menu or from the Automation button in matchIT's Wizard Pane – your job is saved under the Job Reference name you input in step 1. This is described in the Job Maintenance help topic.

You can change the generated job script later to change file names and file setup options, but you must not change processing priorities or add files, because there is currently no way to specify the list code and list priority for the matrix report in the Run/Amend Job Script window.

You can print the Data and Matching summaries and the matching reports from the Input and Matching menus as normal, with the Master File selected. If you change your mind about the Deletion Score you used, you can undelete records using Database Utilities (matchIT's program folder), Verify Matches to determine the new deletion threshold, Delete Matches and finally Produce Matrix reports from the Jobs/Setup, matchIT Jobs menu.

If when using Verify Matches you want to interactively decide on true and false matches in a "grey area", you can flag any pair as a False Match, or increase the score of any pair so that it is included in automatic deletion. You must NOT delete matches interactively in Verify Matches if you want the Matrix Reports to tally.

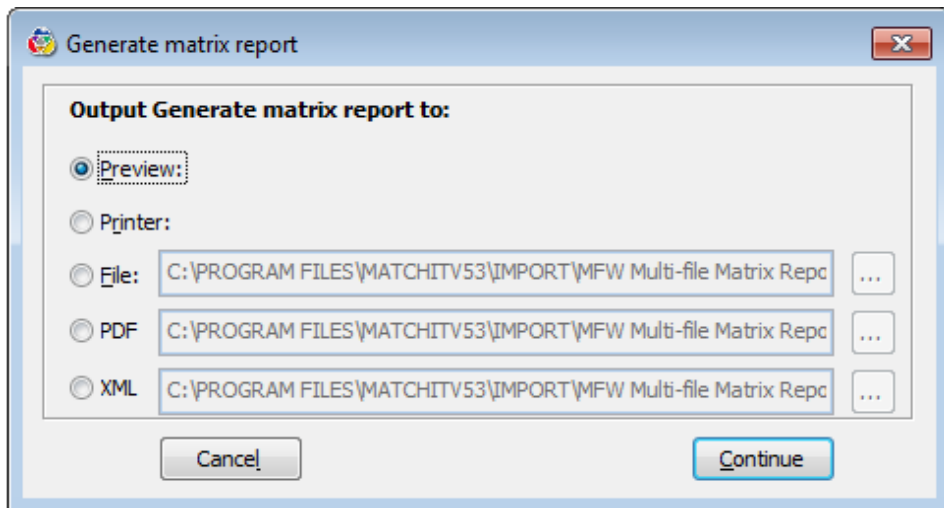
If you do not remove the suppression records from the Master file when prompted, or you undelete them, you can remove them later using the Delete Suppression Records option from the Jobs/Setup, Multiple File Job menu.

Produce Matrix Reports

The 'Produce Matrix Reports' enables you to output the matrix and summary report for a multiple file dedupe job at a different time from running the job script, or generates these reports from a single file dedupe job that has been configured to be compatible with a multiple file job. Note, if you generate reports from a file rather than a job script, then the long descriptions of the constituent files in the job will not appear on the summary report. Instead the report will say 'Mailing File 1', 'Mailing File 2', and 'Suppression File 1', 'Suppression File 2', etc. This is the only difference in the reporting.

Choose 'Produce Matrix Reports' from the Multiple File Job sub-menu of the Jobs/Setup menu.

You will then see a screen, which gives you the choice of choosing which job script you want to produce the matrix reports for, or which single file. If no multiple file job scripts have been set up (that is, using the Multiple File Wizard), then the first option will be disabled, and you will only be able to choose a file. Once the job script or file has been chosen, and the OK button selected, you will then see another screen, which gives you reporting options. You can choose to regenerate the reports here, which you will need to do if you have generated reports for another job or file in the meantime, or need to change the mailing and production costs. However, if you have generated the reports for this job or file previously, and you are happy with the mailing and production costs, then you don't need to regenerate the reports. Clicking the 'Continue' button will then allow you to choose an output format for the matrix report and the summary report.



Output

Producing Output

In matchIT **Lite** you can only Output to File.

You can choose from File, Label and Page options: File creates a file on disk to send elsewhere for printing, Label prints mailing labels and Letter/Page/Report prints letters or envelopes according to a layout that you establish via the Output Layouts option. The information that you enter is mostly similar for all three options.

Main Options

Produce Output: Options for File

Output File Layout

Output Supplied Fields
 Use Custom File Layout

New... Edit... Use All Fields

Layout name: Use all fields

Output file Details

Destination file name: export\result.txt
Output format: COMMA Destination: File

Main Options

Data Options

Use Mailsort options?
 Use sequential numbering?
 Close up blank address lines?
 Use Campaign History options?
 Include flagged records?
 Include Proofing File Output?

Sampling Options

Record at which to start output: 1 and number it: 1
Number of records: All Selection: 0
 Sampling records in every 1000

Output Proofing Options


Proofing file name: export\proof.txt
Number of proofing records: 1 Fill to maximum field width

Filters and Ordering

Use index order? Index Expression: Edit...
 Use filter? Filter Expression: Edit...

Cancel Generate Output

Layout name

This will either show "Use all fields" or a predefined output layout, which you can change by clicking on the  button. You can edit the output layout selected – see [Changing Output Layouts](#).

Defaults:

File Layout defaults to "Use all fields".

Label Layout defaults to ADDRESS.LBX, which is a standard layout which should be suitable for most mailing labels, in terms of content. To change the label dimensions and the number across or down the page, use the Label Wizard via the Edit, Output Layouts menu.

Page Layout defaults to MAILSHOT.FRX, which you will most likely need to amend.

Destination File Name

The name of the output file.

Output Format

This shows the current output format, which can be changed for output to file by using the drop-down list. The options here are basically the same as for [Input Format](#) except for:

- Paradox format (which is not available for output)
- Access (which you can only output by using an ODBC connection, although you can output as a DBF file which you can then read easily in Access, including field labels)
- Excel (which is limited to Excel 5 format and thus 65,000 records, unless you use an ODBC connection).

For ODBC format, the Connection File Name must be a pre-existing connection file (see "[ODBC Manager](#)"). You will be prompted for a file name.

Destination

If the output is labels or letters, it can be previewed on the screen or printed directly.

If you are outputting to file, this option cannot be changed.

Sequential Numbering

- **Sequential numbering:** check this option to generate sequence numbers in the output.
- **Record at which to start printing:** enter the number of the record from which you want to start the output.
- **And number it:** enter the sequence number you want to output, in the first record output (only available once sequential numbering is selected).
- **Number of records:** Either choose "all" (the default) or enter the number of records you want to output.

Close up blank address lines?

Check this option to close up the address lines to eliminate any blank lines in the output. matchIT will prompt you to say whether you want to close up the postcode field as well.

Use Mailsort Options?

Check this option if you wish to use Mailsort Options (if your file has been Mailsorted – see [Mailsort](#)).

Use Campaign History Options?

Check this option to use Campaign History functions (only if you have matchIT Campaign).

Include Flagged Records

Include records that have been flagged, as duplicate or otherwise, in your output file.

Sampling Options

You can print a sample of the records by checking the box and entering a number. See also "[Quality Assurance](#)".

Filters and Ordering

You can create Filters and/or Indexes for any of your Output Files. For example, you may have a filter of **COUNTRY='UK'** and an index of **SURNAME+FORENAMES**. This would output all records with a Country value of "UK", the resultant file would then be sorted by Surname then Forename.

Mailsort Output Options

To produce Mailsorted output, your file should have been Mailsorted first.

Main Options	Mailsort Options	Campaign History
Data Options <input checked="" type="checkbox"/> Use Mailsort options? <input checked="" type="checkbox"/> Use sequential numbering? <input type="checkbox"/> Close up blank address lines? <input type="checkbox"/> Use Campaign History options? <input type="checkbox"/> Include flagged records? <input type="checkbox"/> Include Proofing File Output?	Sampling Options Record at which to start output: <input type="text" value="1"/> and number it: <input type="text" value="1"/> Number of records: <input checked="" type="radio"/> All <input type="radio"/> Selection: <input type="text" value="0"/> <input type="checkbox"/> Sampling <input type="text" value=""/> records in every <input type="text" value="1000"/>	
	Output Proofing Options Proofing file name: <input type="text" value="export\proof.txt"/> ... Number of proofing records: <input type="text" value="1"/> <input type="checkbox"/> Fill to maximum field width	
Filters and Ordering <input type="checkbox"/> Use index order? Index Expression: <input type="text"/> Edit... <input type="checkbox"/> Use filter? Filter Expression: <input type="text"/> Edit...		
<input type="button" value="Cancel"/>	<input type="button" value="Generate Output"/>	

Selection Type

Select whether you want to produce Direct, Residue or Rejected selections in the output. Other options (e.g. Foreign or International Sorted) are available if you have purchased the appropriate modules.

Output Format

You can choose whether to output the selection types as Separate files (click "Specify files" to select the filenames) or Combined as one file (in which case the filename is specified on the Main Options screen. For Combined output, the selections will be output in the following order: Direct, Residue, Rejected, Foreign.

Selection Code Range

Enter Mailsort codes here if you only wish to output a range of codes. (See "[Quality Assurance](#)")

Label Printing Options

The label order defaults to across the page i.e. the first row of labels are printed in Mailsort order left to right across the page, then the next row down is printed etc. If you are going to separate the label stationery into single column strips after printing, to put into a labelling machine, then you will probably want to use Mailsort order down columns.

As the label options also apply to file output, you can intersperse bag labels or bag label markers (to enable the printing from the file output to make use of the bag label breaks), or produce file output in column order suitable for printing labels which will be fed into a strip labelling machine, or for printing e.g. "two up" landscape on continuous stationery.

Campaign History Options

These options are only available in matchIT **Campaign**.

Campaign ID

This is stored in the MAILING_ID field for each record, if this field is defined in the Main File Layout. Mailshot letters in the delivered MAILSHOT.FRX template also take their standard text from the text record for this campaign.

Date

This is the date printed on Mailshot letters and the date stored in the MAIL_DATE field for each record, if this field is defined in the Main File Layout. This feature is available only in matchIT **Campaign**.

Use Reference File

If you have a file of unique reference numbers which you want to mail, one reference number per line, then you can specify the name of the file and matchIT will extract those records from the Main File, Mailsort them if required and output just those records. This feature is available only in matchIT **Campaign**.

Changing Output Layouts


This section is not applicable if you have matchIT **Lite**.

Selecting a Layout to Modify

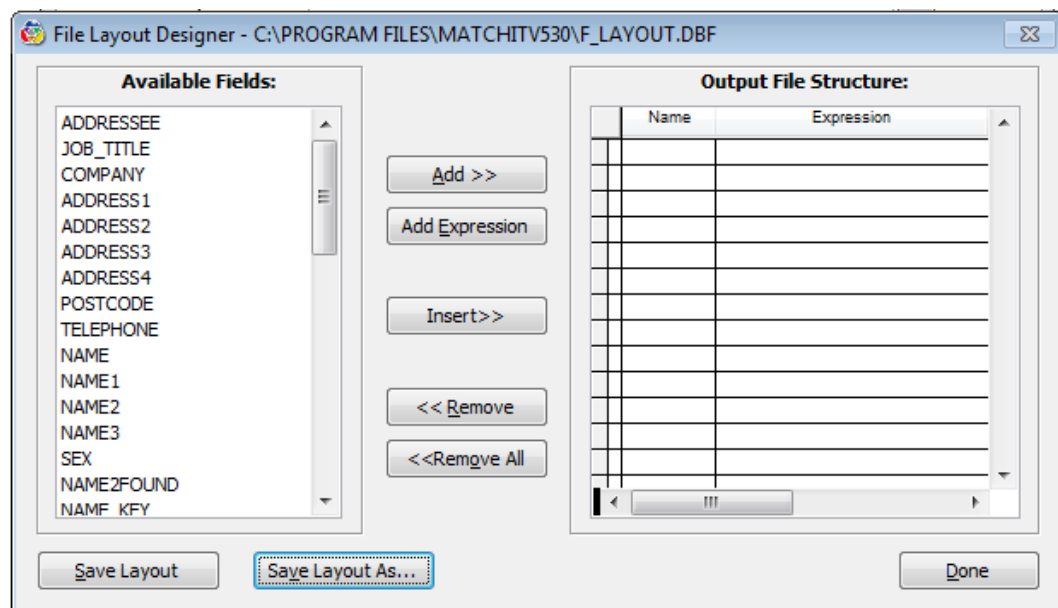
The "Output Layouts" option from the Edit menu allows you to modify file, label or letter/page/report layouts. You can create new formats by saving modified ones under a new name, or by selecting New when asked for a layout to modify.

Select which type of layout you wish to modify and then select the layout name.

File

The list of fields for output to file can be modified and saved for future use. The top line in the dialog shows the file name and path of the current layout: click on the  button to choose other output layout files (*.OPL). Choose the Edit button to change the output layout. You can also select this option from the Edit menu, Output Layouts.

You will then see the File Layout Designer:



This allows you to specify which fields (and field expressions if you wish) will be output to your file. The field picker shows you all the fields which are available in the currently selected file in

the left hand pane, and all the fields which have been selected for output in the right hand pane. You can click on the *Remove All* button in the middle to remove all the fields selected.

You must select the fields from the left hand pane in the order that you want them output. You can scroll down the available fields list to see more fields and double click any field name to move it to the right hand pane. You can also add or insert Field Expressions into the layout e.g. PADL(ALLTRIM(SEQ_NUM), 7, '0') to output a sequence number padded out with leading zeroes (you must output the normal sequence number via the check box as well, because this is the SEQ_NUM field).

Click *Save Layout As* when you have finished editing your layout(s).

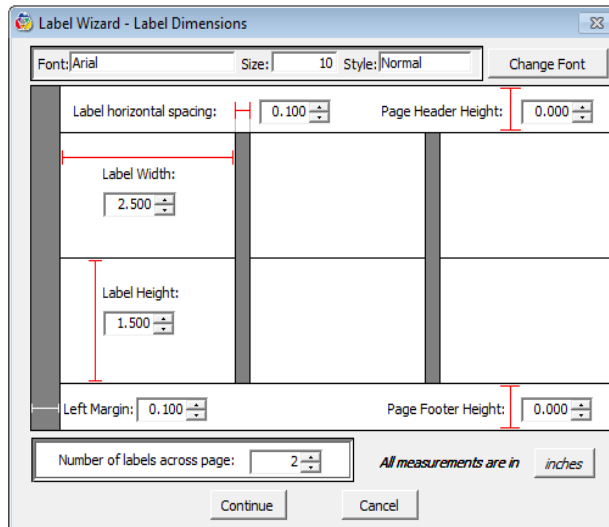
Label

Mailing Labels are address labels, the layout of which can be modified via the Label option of this menu. New Label layouts can be created using the Label Wizard option.

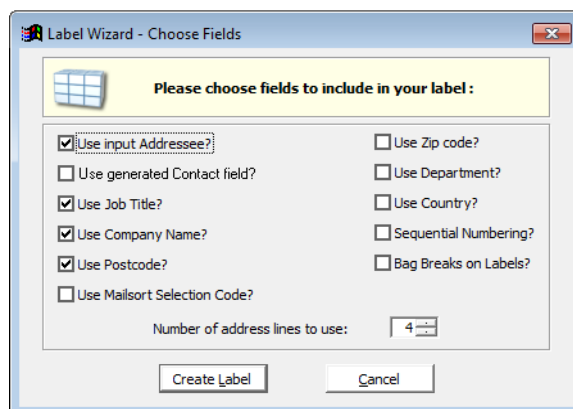
The Label Wizard


In a few steps you can create a simple label which can be used or further modified:

- Select Edit -> Output Layouts -> Label Wizard . If you do not have a Main File open, choose one now.
- matchIT asks a preliminary question about your printer, as it does not support Dot Matrix and line printers.
- Next, the Label Dimensions window is displayed:



- Enter information about label dimensions, margins, and number of labels across the page. You can also select Change Font to change the font used and whether the dimensions are in inches or centimetres.
- Click "Continue" to move to the next stage.
- Now you can select the fields you would like on your label. Check the options required and change the spinner at the bottom to reflect how many address lines are to be used (up to a maximum of the number in your file).



- Click "Create Label" when finished and save your new label.
- You will then be shown your new label in the Label Designer window for further editing. This activates a new set of menus. To display the toolbars, you must select these options from the View menu. Context-sensitive help is displayed in the bottom left-hand corner of the screen.
- You can move the fields around by selecting the box containing the field, then drag it to another place.
- You can add new fields by firstly viewing the Report Controls Toolbar (View menu), then clicking on the  button.
- When you now hover the mouse over the label it forms a crosshair. Click and drag a box to anywhere where there is space.
- An expression builder will pop up. Type the field name you wish to include on the label.
- You can preview the layout without leaving the design view, by selecting Preview from the View menu.

Defaults

Labels should show the direct or residue selection code of their destination, as well as the name and address. The default label layout for both these types of label is ADDRESS.LBX, which is a standard content that should be suitable for most mailing labels, including a person's name, job title, company, 5 address lines plus county and postcode or zip. Any fields which are not defined in your Main File are not printed.

Letter/Page/Report

matchIT's reports as well as your own letter layouts can be edited to include any fields or wording you need. They all use the same report designer as the Label Editor, described above.

Defaults

MAILSHOT.FRX in the Report sub-directory provides a model for printing "mail-merge" type letters. CLIENT.FRX in the same directory is a model for a checklist of customer names and addresses.

There are standard reports provided for printing residential and business records in pairs or sets, namely RESPAIRS, RESSETS, BIZPAIRS and BIZSETS. These formats show the person's name

in the format in which it was imported, postcode, 4 lines of address and (if present) the telephone number. The business formats also show the name of the business after the person's name. If you want to show more or less data, vary the order of the fields or the field widths, you will need to create new report format that you can base on the closest standard report by modifying the standard report and saving it under a new name.

In order to view or change the printing format of any of the reports, or to create new formats, or to change the type of printer, select the Output Layouts option of the Edit menu.

Text

With this option, you can create and modify freeform text for a letter easily, but this text can only be printed in a consistent typeface, not bold, italics etc for individual words or phrases. You can also enter a campaign ID and date, to be stored in fields labelled MAILING_ID and MAIL_DATE in the Customer records – this feature is available only in matchIT **Campaign**. If they are not defined in your Main File Layout, the information is not recorded.

Changing the Printer Setup

Use the Windows Print Manager to control printer selection and setup.

Changing Report Layouts

The Format and Report menus allow many different operations. These include:

- defining new fields and deleting existing fields
- changing field lengths and positions
- changing, moving, adding or deleting headings.

You can cut and paste field definitions from one report to another. You can also move or cut and paste groups of fields.

Don't change the field expressions DUP_REF(REF1) and DUP_REF(REF2) in the matching reports, or move them from their position at the beginning of each line (except that you may position them after the Match Score field). If you do, you may find that data from the wrong client records is printed in the report. You can correct this problem, if it arises, by using the Report menu option "Send To Front".

PRINT format output

Please see the Online help for more information.

Output Flagged Records

This is an option from the Output menu. It is used to create a File consisting of all the flagged records from your Main File.

To create a File containing the flagged records, follow these steps:

- Select "Output Flagged Records" from the Output menu. If you do not have your Main File open, you will be prompted to open it.
- A window will open displaying several different output options, including an option for output format. Once you have set your options e.g. supplied fields or all fields, select Generate Output. You will then be prompted to save the flagged records file.

matchIT will now copy the flagged records from your Main File into the new File you just named and unflag them from this new file. When it has finished, matchIT will automatically select the new file as the Main File.

Quality Assurance

Quality Assurance Introduction

We **strongly recommend** that you use appropriate Quality Assurance Checks to check all output from matchIT before you use it in a "live" or production environment e.g. before you print address labels. matchIT is a very flexible system which will handle all sorts of data, but this very flexibility makes it impossible for us to check out all combinations of parameters, data and user actions in our testing. The duty of care in checking output has to lie with you, the user.

To assist and complement your Quality Assurance Checks, matchIT provides several features.

These procedures will take quite some time on a large file, but the potential for large quantities of errors is much greater on large files, so it is advisable to take the time required to follow these processes.

Please let your support provider know of any errors, omissions or any unexplained results, so that we can address any problems that arise.

We will update this section of the manual as we get feedback and suggestions from our users about Quality Assurance methods, so for the latest version of this topic, please consult the Online Help.

Import Results

This option, from the Import menu, gives you options to preview and print the **Data Summary**, **View Records by Category** and **Non Alpha Numeric Characters**. The Data Summary is produced automatically at the end of Import (or Find Matches if you have Wait for User after Import switched off). You should examine this to make sure that the volumes of data and the nature of the data shown on the summary conform with what you expect e.g. with the last time that you ran similar data through matchIT. The Data Summary is regenerated each time you ask for it, so will show different values after deletion of matches than those generated immediately after Import.

View Records by Category allows you to "home in" on many of the categories of record for which entries are shown on the Data Summary and browse them on screen, print them, delete them from the file and/or copy them out to a separate file.

View Records by Category

You should also use **View Records by Category** from the **Import** menu or the **QA Dashboard**.

It allows you to browse all records meeting selected criteria, most of them are categorised on the Data Summary that is displayed after Import. You can change records and delete records and those changes will be retained in the DBF file – so you can make any corrections that you wish in this view.

You can select several categories to view at once. You can also choose to delete the selected records, print them and/or to write them out to a separate file.

After you browse the selected records, matchIT returns you to the same screen to select more categories if you wish. To leave the screen, select **Close**.

View Data

"**View Data**" from the **View** menu allows you to browse records in different orders e.g.

- browsing in Prefix or Salutation order will show groups of records, typically at the top or bottom of the view, which have default salutations or unusual titles. The vast majority of records will be in a contiguous block i.e. MISS, MR, MRS, MS and Dear Miss, Dear Mr, Dear Mrs and Dear Ms – you should at least spot check these, but then look in detail at the records at the top and bottom of the list (i.e. not Miss, Mr etc.), because here in particular you may find errors or unusual salutations. You will also find default salutations that perhaps should not be default
- browsing in Address line 1 order may show undeliverable items at the top
- browsing in Company order will show blank companies at the top
- browsing other fields is a common technique for spotting problem entries in a field - the problematic entries will usually be at the top or bottom
- browsing in Res_sel order will show Mailsort rejects at the bottom (also available from the Mailsort menu).

Each time you select to browse in order of any field for which an index was not created at the end of Import (such as all the fields mentioned above), matchIT will create an index – this will take quite some time on a large file, but not as much time as sorting out an error when it's too late to pre-empt it.

You can change records and delete records in View Data and these changes are retained in the DBF file – so you can make any corrections that you wish in this view.

Mailsort Summary

Mailsort Summary from the Mailsort menu (or available from a button after Mailsort), allows you to check that the numbers of Direct and Residue selections, rejected records, costs etc. are as you expect, and compare with similar jobs on similar data. You should also check the totals for each category are the same as on the Direct and Residue Line Listings.

Sampling

On the Output Options screen you can print/output a range of records. On the Mailsort Options screen, you can enter a Mailsort selection code range.

One in N sampling

One in N sampling from the Output Options screen is available to help pre-empt problems with final ("live") output. When you choose this option, an intermediate table is created containing a selection of the records in your Main File. For example, if you have a Main File of 100,000 records, and choose One in 1000 sampling, your test file will contain 100 records – the 1000th, 2000th, etc. from your Main File.

Obviously, sampling does not guarantee that there will be no errors in your data.

Other Sampling

If you want to check that bag breaks are being printed or marked correctly, you can do so by printing a consecutive range of items. Mailsort users can do this by using the output by Selection Code Range on the Mailsort Options screen to print, say, two consecutive direct selections. The line listings can tell you how many bags' worth of labels will be printed in each selection.

Alternatively, on the Output Options screen users can choose to output a number of records, the first 100 records from the File, or the 1000th through to the 1100th record.

Preview Output

You can also preview output using matchIT's default address labels, even if you are not printing labels from matchIT or printing labels at all, because this is an easy way to visually check name and address data before committing it to any further processing.

Reports/QA Dashboard

The Reports/QA Dashboard is available directly from the Output menu, and at various other points from the matchIT processing wizards and will guide you through some basic Quality Assurance steps.

[Reports/QA Dashboard -- Mailsort](#)

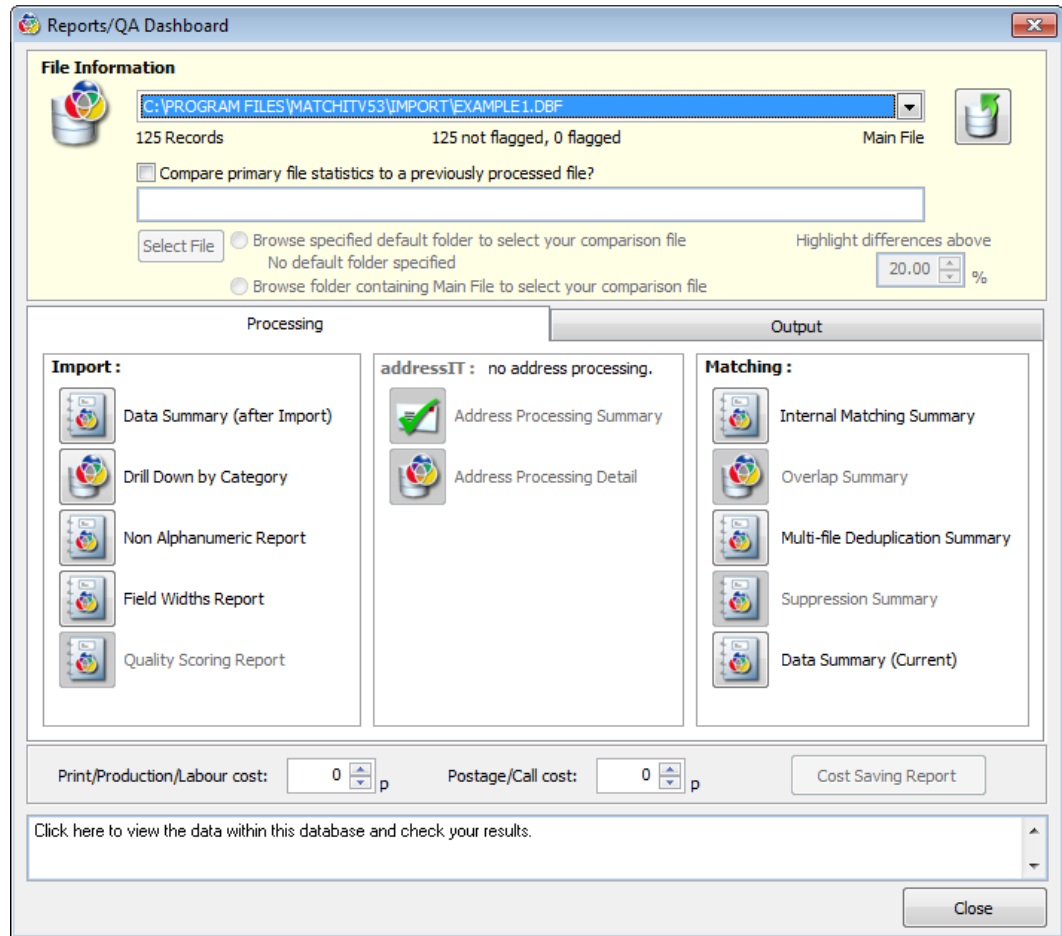
File Information - Compare current data with previous jobs

This section allows you to configure some of the reports available so that the results from your currently imported file can be compared with previously imported data sets. This is a useful QA tool since it will quickly become obvious when comparing your current data file with previous similar jobs if obvious discrepancies exist (e.g. column widths are different, data counts are drastically different).

The reports supporting the compare functionality are as follows:

- Import Summary
- Field Widths Report

Reports/QA Dashboard - Processing



Import Summary

This is a summary of your imported data. It summarizes information such as:

- Potential data errors
- Data enhancement and relocation
- Records which should perhaps be excluded from the output
- Salutations
- Male/Female split
- Forenames found in matchIT's names table.

Note that this report is generated immediately following import, and not re-generated should you subsequently remove duplicates or make any other subsequent changes. To see the latest snapshot of your data, use the Data Summary report from the Import menu.

Address Processing Summary

The addressIT Summary contains postcoding statistics for the Main File, including the results of postcode generation and correction.

Drill down by Category

This allows you to display all records meeting selected categories, most of them as categorised on the Data Summary which you can view after Import.

You can select several categories to view at once. You can also choose to delete the selected records, print them and/or to write them out to a separate file.

After you browse the selected records, matchIT returns you to the same screen to select more categories if you wish. To leave the screen, select Close.

Non Alphanumeric Report

The Non Alphanumeric Report displays all the records in your imported data that contain non alphanumeric data.

Field Widths Report

This allows you to check the maximum and minimum widths of the contents of each field in your imported data.

Quality Scoring Report

This report allows you to check the overall quality of elements in your data such as the individual names, company names, addresses and email addresses.

Reports/QA Dashboard - Mailsort

File Information

C:\PROGRAM FILES\MATCHITV53\IMPORT\EXAMPLE1.DBF
 125 Records 125 not flagged, 0 flagged Main File

Compare primary file statistics to a previously processed file?

Select File Browse specified default folder to select your comparison file
 No default folder specified Highlight differences above 20.00 %
 Browse folder containing Main File to select your comparison file

Processing **Mailsort** **Output**

<i>Postcodes Not Matched</i>	2	<i>Direct Items</i>	0
<i>Suitable for Mailsort</i>	123	<i>Residue Items</i>	123

Mailsort Summary View Rejected Records

Print/Production/Labour cost: 0 p Postage/Call cost: 0 p Cost Saving Report

The Address Processing Summary shows processing statistics for the file, including the success rate of postcode verification/correction.

Close

Mailsort Summary

Mailsort Summary allows you to check that the numbers of Direct and Residue selections, rejected records, costs etc. are as you expect. You should also check the totals for each category are the same as on the Direct and Residue Line Listings.

View Rejected Records

Select this option to review rejected Mailsort records from your Main File.

Note: The Mailsort page is only available if you have the **sortIT** module

Reports/QA Dashboard - Output

All

With this option you can choose to output all records.

Range from

With this option you can choose to output all records or a selection of records.

One-in-N Sampling

When you choose this option, an intermediate table is created containing a selection of the records in your Main File. For example, if you have a Main File of 100,000 records, and choose One in 1000 sampling, your test file will contain 100 records – the 1000th, 2000th, etc. from your Main File. Obviously, sampling does not guarantee that there will be no errors in your data.

Output to File/Output to Page/Output to Label

These buttons will bring you to the standard matchIT Output screen, from which you can access all of the output options available in your version of matchIT, but for the selected sample of records. Even if you never produce labels from matchIT, using the default Address label to preview a sample of names and addresses gives a clearer picture than a Browse view of what those names and addresses will look like if and when they are eventually printed from another piece of software. You can even print a sample of "labels" on plain paper to Q/A them more easily and perhaps file them.

Write Flagged Records

matchIT will now copy the flagged records from your Main File into the new File you just named and unflag them from this new file. When it has finished, matchIT will automatically select the new file as the Main File.

View Data

View Data allows you to browse and update the selected Main File in any order.

Click Close to exit the Reports/QA Dashboard .

Cost Savings Report

This report allows you to enter your Print and Postage costs and see how money you are going to save on any mailing you do having removed duplicates, and having matched your data against any suppression files.

Quality Scoring

Address Quality

The Address Quality Score is designed to measure the completeness of an address independently of whether it has been standardized against a Postal Address File.

The Address Quality Score will be assigned only if there is a field QUAL_ADDR (char 2) in the Main File Layout. The user can add this field in the Setup Wizard.

A separate flag denotes if the record is foreign.

The Address Quality Score is on a scale of 0-9, with quality scores being assigned as follows:

- address matched to Postal Address File and PAF address used - 10
- garbage strings identifiable by pattern recognition e.g. asdasd - 0
- empty - 0
- empty address key - 1
- no town detected and no postcode entered - 3
- no thoroughfare detected - 4
- no town detected but postcode entered - 5
- one point for each of county and country entered, one point for premise detected and two points for each of thoroughfare, town and postcode entered

The maximum score for a non-PAF standard address is therefore 9, .

The quality scores are assessed in the order shown and as soon as a quality condition is met, that score is assigned and the scoring process ends.

The scores are parameterised whether to score points for country, region or premise using flags in Params.dbf as follows:

- QS_REGION – 0 disables scoring for County (UK default setting 0)
- QS_PREMISE – 0 disables scoring for Premise (UK default setting 1)
- QS_COUNTRY – 0 disables scoring for Country (UK default setting 0)

In addition, QS_BLANKPC value 0 restricts addresses without postcodes to a score of 1 (default setting 1).

With the default settings identified above, the scores in the table below should be returned:

Quality	Description
10	PAF address used
7	Premise, thoroughfare, town, postcode populated
6	Thoroughfare, town,

	postcode populated
5	Thoroughfare, postcode populated
4	Town, postcode populated
3	Thoroughfare detected with or without premise but no town or postcode
1	Empty address key (town and thoroughfare can not be detected)
0	Empty address and empty postcode

Organisation Quality

The quality score will be assigned only if there is a field QUAL_ORG (char 2) in the Main File Layout and the option to add PAF address in new fields is used. The user can add the QUAL_ORG field in the Setup Wizard.

The table below shows the Organisation quality scores after cleaning;

Quality	Description
99	Organisation in its own field and equals PAF matched Organisation
90	Organisation in its own field and either the PAF Organisation is in the Organisation or the Organisation is in the PAF Organisation
80	Organisation in its own field and no PAF match on Organisation
70	Organisation detected in Address line 1 and equals PAF matched Organisation
60	Organisation detected in Address line 2 and equals PAF matched Organisation
50	Organisation detected in Address line 1 and either the PAF Organisation is in Address line 1 or Address line 1 is in the PAF Organisation
40	Organisation detected in Address line 2 and either the PAF Organisation is in Address line 2 or Address line 2 is in the PAF Organisation
30	Organisation detected in Address line 1 through Names.dat business word identification, there is no PAF match

20	Organisation detected in Address line 2 through Names.dat business word identification, there is no PAF match
10	PAF found Organisation and no match in Address line 1 or Address line 2 and no Names.dat business word identification in address line 1 or 2
01	No Organisation
05	None of the other conditions in the table are met

The quality scores are assessed in the order shown and as soon as a quality condition is met, that score is assigned and the scoring process ends.

Name Quality

The quality score will be assigned only if there is a field QUAL_INDIV (char 2) in the Main File Layout. The user can add this field in the Setup Wizard.

We will provide a quality score for name on a scale of 0-9 (with 0 being the poorest quality), with quality scores being assigned as follows:

- 0 = Empty
- 0 = sdf i.e. repeated patterns denoting garbage
- 0 = Empty name key
- 1 = John
- 2 = Smith
- 3 = J Smith
- 4 = Mr Smith
- 5 = Mr J Smith
- 6 = Joh Smith (Unrecognized first name or error in first name, no prefix)
- 7 = John Smith
- 8 = John R Smith
- 9 = Mr John Smith
- 10 = Mr John R Smith

The quality scores are assessed in the order shown and as soon as a quality condition is met, that score is assigned and the scoring process ends.

To generalise the examples above, the scores in the table below should be returned, after any name parsing, casing or salutation generation:

Quality	Description
10	Surname, input title, forename and middle initial(s) all populated

9	Surname, input title, forename all populated, no middle initial
8	Surname and forename and middle initial populated but no input title
7	Surname and forename recognised in Names.dat populated but no input title
6	Surname, and forename unrecognised in Names.dat, populated
5	Surname, title and initials populated, no forename or length of forename is 1 character
4	Surname and title populated, no forename or initials
3	Surname and initial(s) populated but no title or forename
2	Surname populated but no title, initials or forename
1	Empty surname

Email Quality

The quality score will be assigned only if there is a field QUAL_EMAIL (char 2) in the Main File Layout. The user can add this field in the Setup Wizard.

We will provide a quality score for email on a scale of 0-9 (with 0 being the poorest quality), with quality scores being assigned as follows:

- 0 = Empty
- 0 = Nonsense
- 9 = Username, domain, and recognised top-level domain (TLD) found
- 2 = Top level domain (TLD) not recognised

Campaign Processing

This section is only applicable if you have matchIT **Campaign**.

Introduction to Campaign Processing

The Campaign module of matchIT allows you to select records for mailing campaigns and keep track of who was selected for each campaign. Each time you produce a Mailshot or output file, matchIT will automatically update your Campaign History table with details of the current campaign. Later on, you can examine this history table.

To maintain Campaign History automatically, you will need to add the fields **MAILING_ID**(width 10) and **MAIL_DATE**(Date type) to your Main File Layout. The Setup Wizard will normally add these fields automatically, but you can add them manually by specifying them at the end of the Setup Wizard or via Main File Layout option in the Tools menu.

You will also need a History table. Whenever you update mailing history, matchIT will ask you for a History table. You can create a new History table at any time by entering a new name when asked. We recommend that you use separate folders for each campaign that you are tracking, so that the history tables for each campaign are kept separate.

The Campaign Process

There are 5 main steps involved in the campaign process in matchIT:

- Firstly, import and deduplicate your data in the normal way for matchIT. Basically, you should create the table which (or part of which) will be used in the output step.
- Secondly, run a query if you want to select a subset of the records on the table for output. You may also use a separate file of reference numbers (such as one generated by analysis software) to filter the output.
- The next step is to create the actual output. You may need to create a Campaign record to record the Campaign Identifier and date. When the output is created, the actual updating of the history file usually takes place.
- Some users producing multiple mailshots or output files from different selections of the master file may find it more efficient to create all the output first, and then update the mailing history file afterwards. In this case, an additional step (updating the history file) will be needed.
- Viewing Campaign History allows you to see when each record in the Main File was selected, for which campaigns.

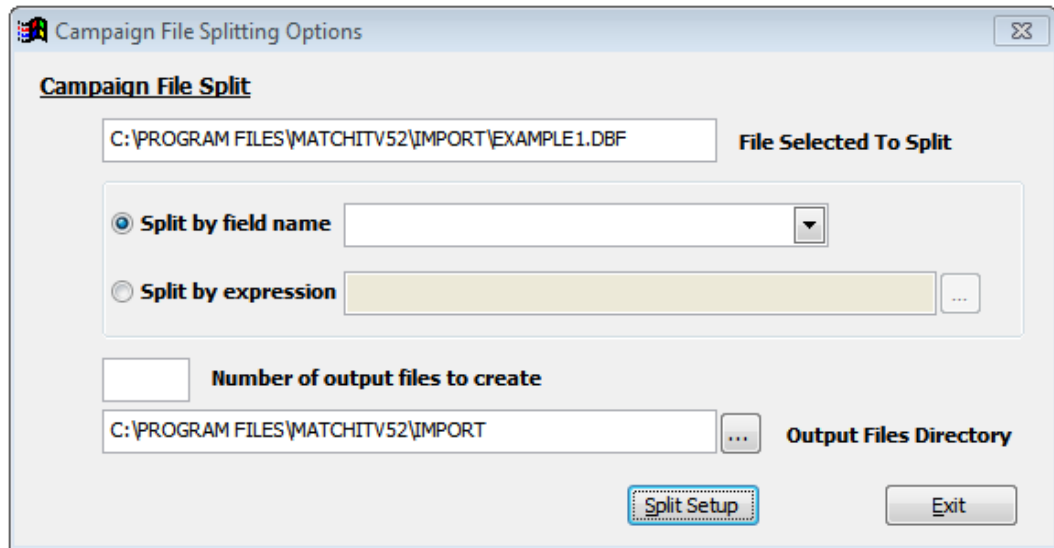
Campaign Options

The Campaign Options can be accessed through the Output screen's Campaign Options tab or by running a Query with Use Campaign History Options switched on.

- **Campaign ID** – Either select one from the list or add a new ID by clicking the Add button. Campaign IDs can be deleted by clicking on the Remove button.
- **Date** – Enter the date the mailshot is to be sent.
- **Use Reference File** – Switch this option on to use an external list of references to filter the output/query. The list of references should be in a comma-separated ASCII file format (basically, one reference per line). The reference length should be the same as the length of UNIQUE_REF in your Main File. For each reference that matches to a UNIQUE_REF in the Main File, one record will be output. Click on the *Choose Another* button to select the reference file. matchIT will remember the file name the next time.

Campaign File Splitting Options

The "Split file for a Campaign" option is located under the Campaign Processing section of the Output menu.



The above window allows you to control what file to output and what field/expression to split on. You can also specify how many output fields you would like created, and where they need to be stored.

Campaign History

Creating and Updating Campaign History

To create or update a Campaign History table, all you need to do is Run a Query or go through the steps to produce output with Output to File or Printer. In either case, you must switch Use Campaign History Options on and set those options accordingly (See Campaign Options). It should be noted that if you produce an output as a print preview, this will NOT cause Campaign History to be updated. Also, you must have the fields MAILING_ID and MAIL_DATE in your Main File to trigger matchIT's Campaign History function.

When you produce a mailshot, either by running a Query or by Generating Output, matchIT will ask you if you would like to update a Campaign History file.

If you answer 'Yes' to this question, you will then need to choose a History table to be updated. If you have not already created a history for this Main File, just type in the name of the new history table in the file selector. matchIT will automatically create a new History table if it does not exist.

If you answer 'No' to the above question, updates can always be made later.

Viewing Campaign History

To view Campaign History, choose the **View Campaign History** menu option from the **Output** menu. matchIT will now ask you for a History table. You should choose your Campaign History table for this Main File.

Queries

This section is only applicable if you have matchIT **Campaign**.

Query Overview

Queries provide the facility to search a chosen table for all records whose contents have characteristics that you specify. You can define standard queries that you can repeat later or modify.

Queries are manipulated through the Query Manager.

Query Manager

Using the Query Manager, you can create a query or run an existing query.

Query Manager

Query Name:

Filter Fields Order By User-Defined Clauses

Enter simple conditions or use Expression Builder for complex conditions.

Field: Not: Operator: Casing:

Filter Conditions:

Use Campaign History Options?

Query Name

The name of the current Query will be displayed if you have either Saved the Query or Opened an existing Query.

Filter

Filter Conditions are used to limit the records that will be included in the Results Table. For example, a filter of COUNTRY#'UK' would output any records that did not have a Country value equal to "UK".

Fields

The Fields page is used to select the fields that will be included in the Results Table.

Order By

On the Order By page, select the fields by which you want the Results File ordered.

User-Defined Clauses

Additional SQL Select clauses can be added in the User-Defined Clauses page.

Use Campaign History Options

Check this to use Campaign History Options. Your Main File must contain the fields MAIL_DATE and MAILING_ID. This option cannot be used with a Query containing a GROUP BY clause in the User-Defined Clauses. When you run a query with this option switched on, you will be brought to the Campaign Options screen.

View SQL

To edit the SQL Select statement directly, click on the View SQL button.

Clear All

Click on the Clear All button to remove all of the filter conditions, field selections and clauses you have entered.

New Query

Clicking on the New Query button will close the existing Query without saving changes.

Run

After either creating a new Query or Opening a previously saved Query, click on the Run button. Alternatively, select Run Query from the Query menu and select a previously saved Query. You will be prompted to name the Results File. This is the file in which the results of your Query will be stored.

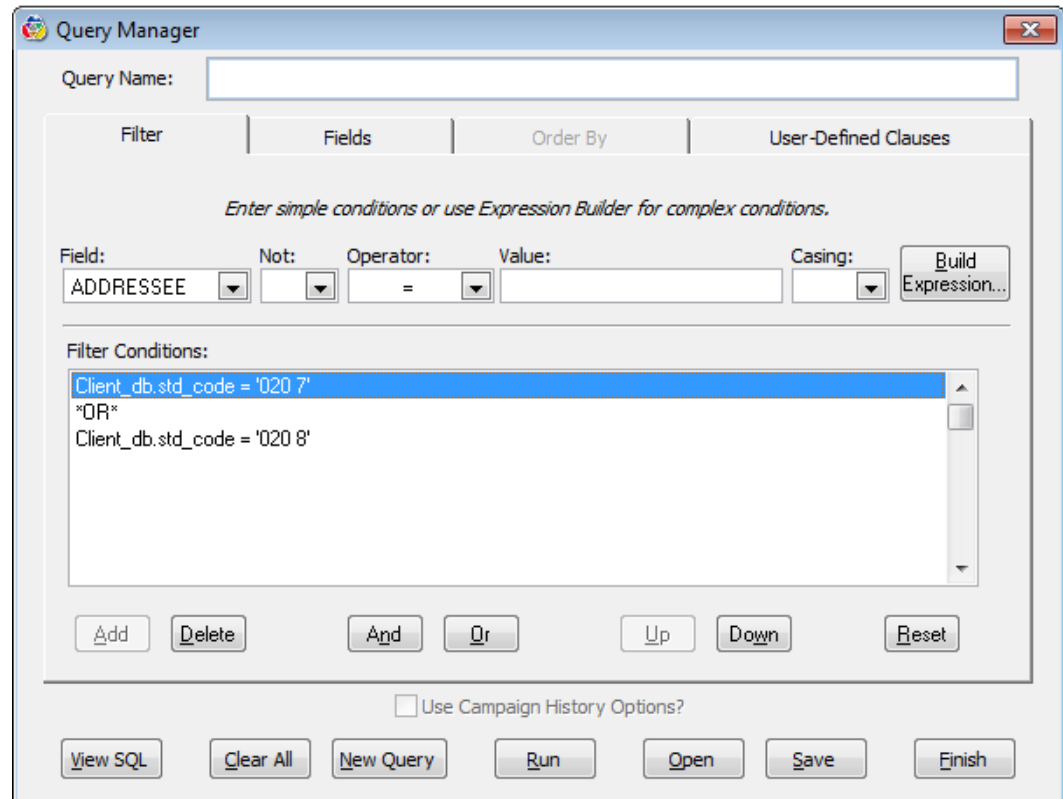
Open

To open a pre-existing Query, click on the Open button.

Save

To save the current Query, click on the Save button. You will be prompted to name a Query File. Once saved, a Query can be opened in the Query Manager or run by selecting Run Query from the Query Menu.

Query Manager – Filter



To enter a simple condition, choose the Field and Operator, enter a Value and choose a Casing option (if desired), then click on the Add button. To build a more complex condition, click on the Build Expression button.

Field

This drop-down list contains all of the fields that exist in the Main File. Choose the field for which you want to create a condition.

Not

Select Not to negate the condition.

Operator

Choose an operator for the condition.

Value

Enter the value for which you are testing. When the Empty Operator is chosen, Value will be unavailable.

Casing

The Casing option selected will be applied to both the Field and Value you have selected. If you have chosen Upper, then the Uppercase of the field will be compared with the Uppercase of the value you have entered. When the Empty, Length > and Length < Operators are chosen, Casing will be unavailable.

Build Expression

Click this button to access the Expression Builder. This will allow you to build more complex filter conditions.

Filter Conditions

This window displays the filter conditions that will be applied to the query.

Add

Click the Add button to add a condition to the Filter Conditions window. The Filter Condition added will be based on the values of Fields, Operator, Value and Casing.

Delete

Click on Delete to remove the currently selected condition from the Filter Conditions window.

And/Or

To create multiple condition in your Query, click on the And/Or buttons to add the appropriate connector to the Filter Expressions window.

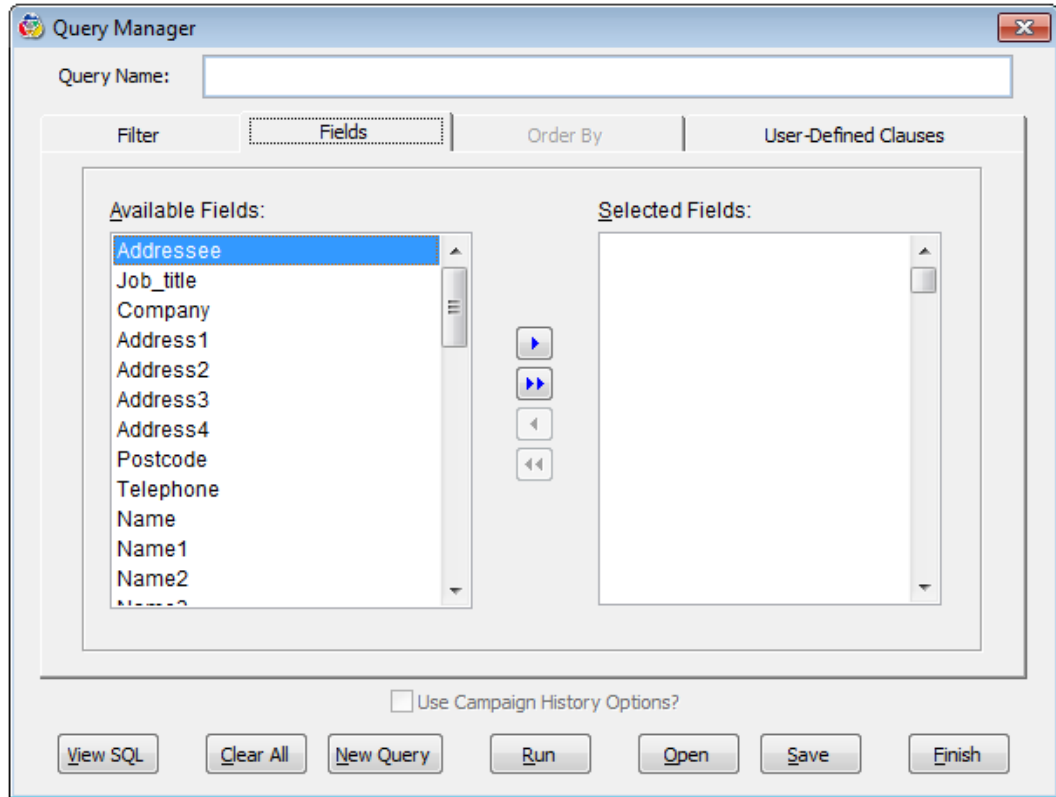
Up/Down

Click on the Up/Down buttons to rearrange the filter conditions in the Filter Expressions window.

Reset

The reset button will remove all of the Filter Conditions you have entered.

Query Manager – Fields



Available Fields

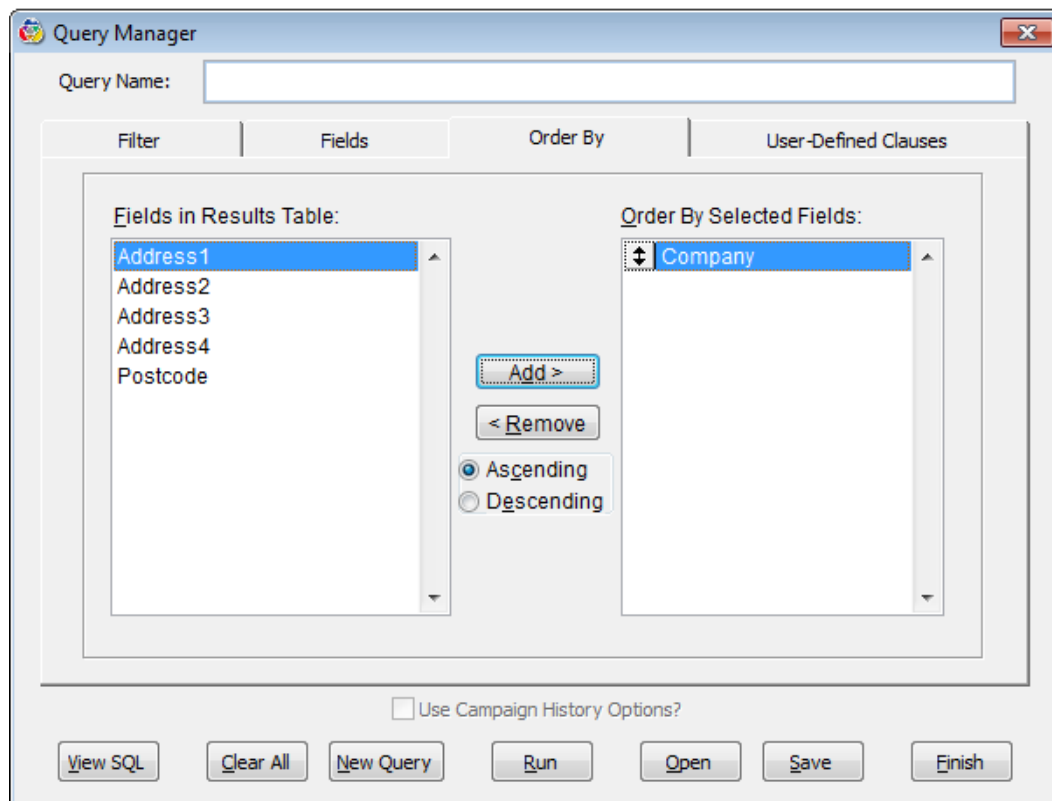
This window will display the fields that exist in the Main File. To transfer a field from this window to the Selected Fields window either click on the single right arrow button or double click on the field name itself. Clicking on the double right arrow button will move all fields from the Available Fields window to the Selected Fields window.

Selected Fields

This window will display the fields that will be included in the Results Table. To remove a field from this window either click on the single left arrow button or double click on the field name itself. The field will then be moved back to the Available Fields window. Clicking on the double right arrow button will move all fields from the Selected Fields window to the Available Fields window.

NOTE: If no fields appear in the Selected Fields window, all fields that exist in the currently selected table will be included in the Results Table.

Query Manager – Order By



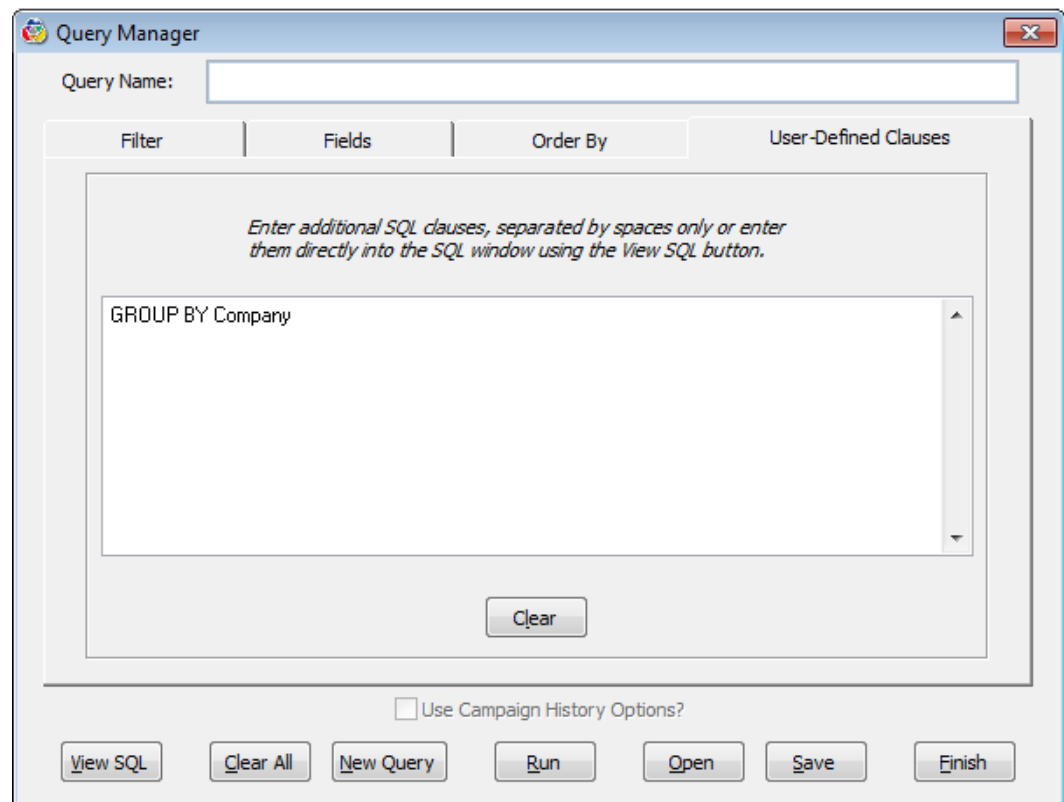
Fields in Results Table

This window will display all of the fields you have selected to appear in the Results File. To transfer a field from this window to the Order By Selected Fields window choose Ascending or Descending, then either click on the Add Button or double click on the field name itself.

Order By Selected Fields

The Results Table will be ordered by the fields listed in this window. To remove a field from this window, either click on the Remove button or double click on the field name itself.

Query Manager – User-Defined Clauses



Any additional SQL Select clauses you wish to use can be entered in the User-Defined Clauses window. Alternatively, you can edit the SQL Select statement directly using the View SQL button.

Clear

Click on the Clear button to remove all User-Defined Clauses you have entered.

Count Values

Select Count Values from the Query menu to create a simple query to count the occurrences of the values contained in a field (or field expression) of your Main File. You can Run this query from the Count Values screen or Save the query, which can then be opened in the Query Manager.

Run Query

Select Run Query from the Query menu to run a previously saved Query. If the Main file and the Query comply with the Campaign requirements, you will be asked if you want to Use Campaign History Options. If you answer Yes, you will be brought to the Campaign Options screen. If you answer No, or upon exiting the Campaign Options screen, you will be prompted for a Results File name. This will be the name of the file containing the results of your Query.

System Commands Overview

If you know some FoxPro (matchIT uses Visual FoxPro) or dBase (known as "xBASE") programming, you can use the System Commands utility to key in simple xBASE commands. The System Commands facility is not intended to replace any requirement for a full FoxPro license rather than the run-time one included with matchIT, and your support provider does not provide telephone support, Online Help or documentation for program commands other than the examples below.

As all files are closed when you select the System Commands option from the Tools menu, you will have to first use the database you want, or select it after keying any command that requires a database.

Some FoxPro commands that you might find useful are (type the command in the box then click "Process Command"):

- To open a database file for use by other commands:

```
USE ?
```

(then select the database)

- To set the order of a database:

```
SET ORDER TO UNIQUE_REF (if the index exists)
```

```
INDEX ON ADDRESS1 TO TEMP (if the index doesn't exist)
```

- To browse (view) a database:

```
BROWSE
```

(This allows various facilities to reposition on a different record, seek a key etc. through the Browse menu)

- To delete all records from a database from the current record onwards:

```
DELETE REST
```

In this example, REST is a scope clause - scope clauses can be added to all the commands below. Other examples of scope clauses are ALL, NEXT 100, NEXT 9999 etc.

- To recall logically deleted records from a database for a condition:

```
RECALL FOR condition
```

- To delete all records from a database which have blank addressee AND company fields, OR blank address lines 1, 2 and 3:

```
DELETE ALL FOR (EMPTY (ADDRESSEE) AND EMPTY (COMPANY) )  
OR (EMPTY (ADDRESS1) AND EMPTY (ADDRESS2) AND  
EMPTY (ADDRESS3) )
```

In this example, FOR specifies a condition clause - you can combine condition clauses with AND and OR and use brackets to control the way in which the conditions are combined. Note the additional brackets in this example, surrounding the first condition (to the left of the OR) and the second condition (to the right of the OR)

- To initialise a field called `LISTSOURCE` to a value `'ABC'` if it is blank, for a given range of unique reference numbers:

```
REPLACE ALL LISTSOURCE WITH 'ABC' FOR  
EMPTY(LISTSOURCE) AND BETWEEN(UNIQUE_REF, '0001000',  
'0099999')
```

- To copy records for various list sources to another file and then delete them from the first file:

```
COPY TO drive:path\filename FOR INLIST(LISTSOURCE,  
'ABC', 'XYZ', '123' etc.)  
  
DELETE FOR INLIST(LISTSOURCE, 'ABC', 'XYZ', '123'  
etc.)
```

- To create a copy of the file in a sorted order:

```
SORT TO drive:path\filename ON fieldname1, fieldname2, fieldname3 etc.  
FOR condition
```

Configuring Centralised Files

Configuring Centralised Files

It is recommended that matchIT be installed to the Centralised File Server (CFS) to provide easy access to the configuration of the Centralised Files. The CFS can be any Windows based hardware capable of running matchIT Desktop.

Install matchIT to the CFS or select an existing matchIT client as the CFS. Ensure all Suppression and PAF options are configured correctly and function normally.

If you choose to use an existing matchIT client as the CFS make sure it is NOT using the Centralised files as its default Suppression/PAF data. Copy the data to a new folder e.g. C:\CSUPPRESSION or C:\CPAF or C:\CDAT, where C indicates Centralised.

Centralised Suppression files

On the machine selected as the Centralised File Server (CFS):

1. Install/copy your suppression files to e.g. C:\CSUPPRESSION
2. Copy the file SUPPLOC.SDBF (from the \matchITv6 directory) to the CFS dir e.g. C:\CSUPPRESSION\SUPPLOC.SDBF
3. Share this folder (allow all users, read only access) to enable access from the network via mapped drive or network share

On the matchIT clients (MIC):

1. Install/copy your suppression files to a local disk and set suppression file locations on the local copy of matchIT as usual (menu SUPPRESSION>SUPPRESSION OPTIONS>STANDARD SUPPRESSION OPTIONS). From within matchIT (using the menu VIEW>VIEW TABLE and change 'Files of type' to 'All files'), open MATCHIT.INI and under the CSUPPLOC field, enter the network path to your CFS where the SUPPLOC.SDBF file resides e.g. \\CFS\SUPPRESSION , then close MATCHIT.INI.
2. Open SUPPLOC.SDBF on the CFS e.g. \\CFS\CSUPPRESSION\SUPPLOC.SDBF.
3. Edit the path for all files from e.g. C:\CSUPPRESSION\DISCONNECT\DECEASED.SDBF to reflect the network path e.g. \\CFS\CSUPPRESSION\DISCONNECT\DECEASED.SDBF

When matchIT is started on the MIC a check is done comparing the local suppression files (as specified in the local SUPPLOC.SDBF) to the centralised suppression files. If the local file is older, the user is prompted to update the local copy. If they reply yes, ALL out of date MIC files are updated with CFS files. If they reply no, a warning is displayed stating that no local suppression files will be refreshed. Due to the size of the Suppression files, copying the entire set may take several minutes depending on data volumes and network speed/traffic.

Centralised PAF files

On the machine selected as the Centralised File Server (CFS):

1. Install/copy your PAF files to C:\CPAF
2. Share this folder (allow all users, read only access) to enable access from the network via mapped drive or network share

On the matchIT client (MIC):

You must ensure a local copy of the PAF files are installed and working for any updates to take place. If the files are missing, no action is taken to update them.

From within matchIT (using the menu VIEW>VIEW TABLE and change 'Files of type' to 'All files'), open MATCHIT.INI and under the CPAFLOCS field, enter the network path to your CFS where the PAF files reside e.g. \\CFS\CPAF.

When matchIT is started on the MIC a check is done comparing the local PAF files to the centralised PAF files. If the local file is older, all files in the centralised CPAF location will be copied invariably to the local PAF location.

Centralised DAT files

On the machine selected as the Centralised File Server (CFS):

1. Copy matchIT DAT files to C:\CDAT
2. Share this folder (allow all users, read only access) to enable access from the network via mapped drive or network share

On the matchIT client (MIC):

From within matchIT (using the menu VIEW>VIEW TABLE and change 'Files of type' to 'All files'), open MATCHIT.INI and under the CDATLOCS field, enter the network path to your CFS where the CDAT files reside e.g. \\CFS\CDAT, then close MATCHIT.INI.

When matchIT is started, ALL files in the CDAT location with file extension DAT and also Business noise words.DBF and mail_exclusions.dbf will be copied invariably to the local DAT location in PARAMS.DBF.

The DAT location may also be viewed/edited in matchIT via menu: JOB/SETUP>OPTIONS>FILE LOCATIONS, DAT FILES PATH

NOTE: The matchIT DAT location must be within the matchIT directory 'C:\Program Files\matchITv6' for update to take place. This restriction enables a user to use a non-standard local set of DAT files for a specific job (via matchIT Options, File Locations). Customised DAT files stored outside of the matchIT directory will not be updated.

Database Utilities

Functions of Database Utilities

You can run Database Utilities from the matchIT Program Group, or run FIXDB.EXE in the matchIT directory. This utility can be used for many different things, for example:

- modify layouts of matchIT's parameter tables
- search for corrupt tables or indexes in the matchIT directory tree
- rebuild corrupt indexes
- correct a corrupt database header
- permanently delete "logically deleted" records
- recall "logically deleted" records
- wipe a whole table permanently of all records
- view and report on any database (table)
- change a delimiter in an ASCII text file
- append to any table from DBF and text files
- export from any table to DBF and text files
- regenerate matchIT's UNIQUE_REF so it is unique
- blank out a specific field in a database
- eliminate blank address lines by shuffling up later lines
- limit field widths to the maximum size of the data within them
- generate an Addressee field from Prefix, Forenames and Surname.

Only the most commonly used options are described below; the remainder are described in the Online Help.

Use the normal matchIT menus in preference to Database Utilities whenever possible as Database Utilities does not perform the usual safety checks that matchIT does.

File Menu Options

Choose Database: to open a different database (table) from that selected previously

Convert Text File: while matchIT can cope with most standard data formats, occasionally you may have to deal with a non-standard data file. If you want to import a delimited file which has no Carriage Return Line Feed (CRLF) at the end of each record, matchIT has to convert it before Import. This option will convert such a file into comma delimited format (CSV). You will need to know how many fields there are in your data file and what the delimiting character is. Follow the on-screen prompts. You will then be asked for a filename for the newly created file.

Append: appends records into a DBF file from another DBF file, comma or tab delimited file, or an SDF (fixed length) file. This can be useful when you want to create a DBF quickly without matching, perhaps to do some reformatting before asking matchIT to process it. The field names and file layout must be the same before appending.

Export Database: exports a file to a choice of formats, with a new file name.

Quit Database Utilities: to return to Windows.

Database Menu Options

All of these options ask you to select a database if one is not in use.

Modify Structure

This option allows you to change the structure of any database (change the fields in a table).

Undelete

If you select the Undelete option, all logically flagged records are recalled to the database, e.g. from when you flagged matches.

Pack

Permanently deletes records from the table.

Zap

Permanently deletes all records (not just logically deleted ones).

Fix Header

This corrects a DBF file header where the number of records in the header is wrong, e.g. if you ran out of disk space during an Import

Recreate Index

A DBF file cannot be used if it has a corrupt CDX index attached to it. This option will remove the index and then create a new one. It is the equivalent of deleting the CDX file through Windows Explorer and then using Reindex to index the DBF.

Reindex

Recreates indexes for a DBF file (including matchIT's files, not just your Main Files).

Browse Last/Reset Browse

These options allow you to change data, recall deleted records etc. In Database Utilities, unlike in View Table in matchIT, deleted records are visible but are denoted by a thick black line in the left margin. The Reset Browse option also makes the Browse window display revert to the default configuration, allowing you to set up a new view if you have a problem with the current view.

Count Records

This option allows you to count the records in the database from the record that you are positioned on (for example, after Browsing) to the end of the file. If you have just opened the file, this will be the total number of records in the table.

Field Menu Options

Generate Unique Refs

Creates new unique references in the file, starting at the number you enter. This ensures the reference numbers are unique, for example if you have been having problems with matching. After selecting this option, you will need to redo any matching performed on the File.

Check Unique Refs

Checks all the reference numbers (in a field called UNIQUE_REF) are actually unique. If they are not, use generate unique references to recreate them (see above).

Close up blank address lines?

If there are gaps in your address lines, either because of the original database layout or because matchIT has extracted, say, company names and postcodes, you can remove them using this option. It will move all address lines to the 'top' by filling Address1 first, then Address2, etc.

Change Fields to Fit

Changes the width of all character fields in the Main File to the maximum width of the data in each field. This does not change or empty any of matchIT's key data fields.

Generate Addressee

Creates a freeform name field from Prefix, Forenames and Surname – use this when the contents of Prefix, Forenames and Surname are not reliably the components of an individual's name e.g. Prefix = "The", Forenames = "Managing" and Surname = "Director".

Report Menu Options

List Structure

This option allows you to list (i.e. print out) the structure of any database.

Check Files

This facility goes through the matchIT directory and all its sub-directories, attempting to open all of the database it finds. If there is an error opening a databases, this is reported to the screen, along with the name of the database, and the reason for the error. This can be extremely useful when there has been a hard disk crash, for instance, and a database (or index) has become corrupted. This option will be able to track it down straight away.

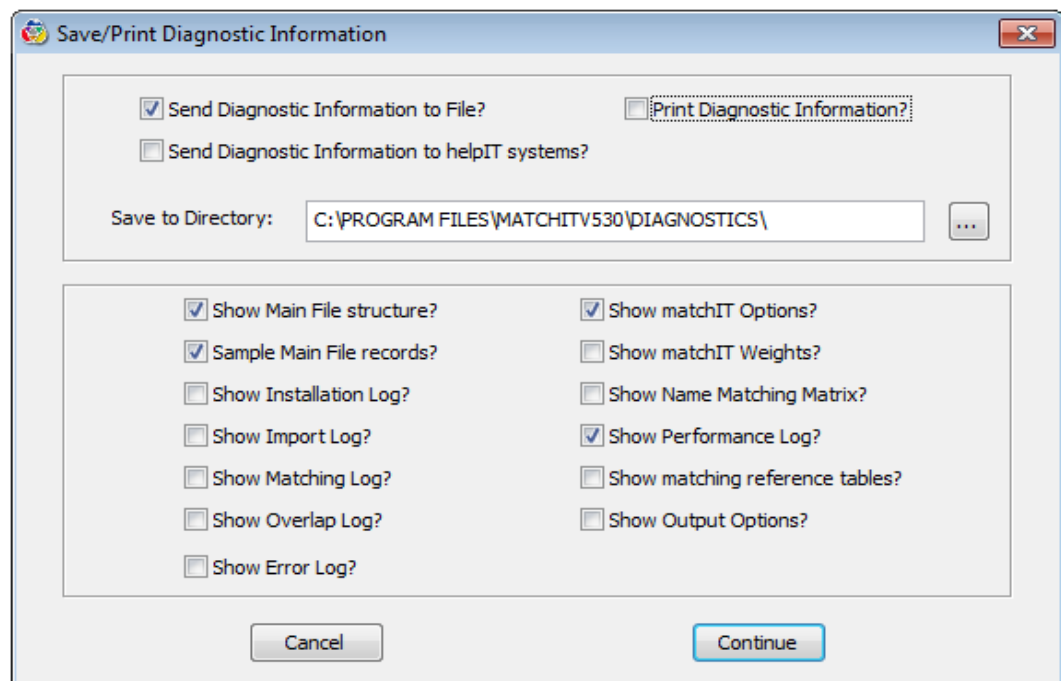
Problems

Error Log

When an error occurs in matchIT, it is recorded in a log, along with some useful diagnostic information. You can examine the Error Log from the View menu. matchIT positions on the last error to occur – scroll up to see previous entries. Close this screen by pressing Esc or clicking the X in the top right corner. matchIT will then ask if you wish to print any of the entries – it will start with the last one.

When calling the support line, you may be asked to look up the program and line number recorded in this log. Also, not all errors are displayed in a message box on the screen – often the cause of the problem occurred earlier in operation. You should always scroll back in the error log, looking for the first record with the appropriate date and time.

Print Diagnostic Information



From the Tools menu, this option allows you to easily send diagnostic information to a printer or file. If you send the report to file, it is advisable to send them to a clean directory – it may get a bit confusing otherwise. This allows you to simply see your current matching setup, the layout of your Main File, sample records and/or the logs matchIT produces. For example, these can help you work out why a matching run did not produce the expected results. These reports are:

- Main File Structure – the layout of the selected Main File
- Sample of Records – a dump of the first 100 and last 20 records in the selected Main File

- Installation Log – the date and time the installation started, and the files that were copied or replaced.
- Import Log – a record of the last import. If an import was aborted for whatever reason, the last record number will be shown – otherwise it will contain the number of records in the database.
- Matching Log and Overlap Log – The number of records in the database and the number of comparisons made while matching.
- Error Log – the contents of the MIERROR.DBF.
- matchIT Options – the contents of the PARAMS.DBF.
- matchIT Weights – the contents of the WEIGHTS.DBF.
- Name Matching Matrix – the contents of the NAMEPARM.DBF.
- Performance Log – the contents of the PERFORM.DBF.
- Matching Reference Table – the contents of the MATCHES.MDF.
- Output Options

Solving Problems

Error Messages

matchIT deals with errors by referring to a database of FoxPro error codes (MIACTION.DBF). It then takes the action indicated by the entry, in the database for that error. Full information about the error is recorded in the MIERROR database, this information can be vital for your support provider or your own PC support people to diagnose the problem. Each record in the MIERROR database is very large, so if the MIERROR.DBF grows to more than 100 records it is automatically cut back to the last 50 errors logged. The third database involved is MIPERSON.DBF. This contains two records; the first record contains the title, name and extension number of the on-site person responsible for supporting matchIT: you may change the details here by browsing the database and overkeying the information. The second contains details pertaining to your support provider, for reporting problems which may not be able to be resolved on-site.

If the error which occurs does not have a corresponding entry in MIACTION.DBF, the default error 99999 is used. You can update or add entries to MIACTION.DBF, to specify different treatment of the error. However, this should only be done on the advice of your support provider.

Accordingly, a list of error messages, their meaning and the action you should take is not printed here: in the event of an error, the relevant information will be displayed.

When the error display says "We'll carry on from where we can", matchIT waits a few seconds for a response, then carries on with the next step of the program. If you want to abort the process and return to the menu, press Escape.

Problems Caused by Power Failure Etc.

Power failure or hardware/system software "glitches" causing data corruption are a common source of problems. This is usually during Import or Matching, as they are the longest duration processes. Any database the system is writing to at the time could be corrupted, giving the message

"NOT A TABLE"

when it is next used. The next line will contain the name of the database causing the problem e.g. MATCHES.DBF in the example in the previous section. If so, restore this file (which may be in one of the sub-directories of matchIT) from backup.

If you are not sure which file is corrupt, or have some problem starting matchIT, you can use the [Check Files](#) option in Database Utilities to find out which file(s) report problems.

You can selectively reinstall the versions of any files originally delivered: to do this, run the SETUP program on the installation CD (as for the initial installation) but add /X to the SETUP command e.g. run

D:SETUP /X

You will see a list of the installation files displayed on the screen. They are listed alphabetically by type i.e. all the DBF files are grouped together and all the FRX files are together etc. You need to select the file(s) you want to restore, and the directory you want to restore them to.

If the problem occurred during the Import run, the most likely database to be corrupted is the selected Main File. If you have modified the layout, there will be an earlier backup file in the DATABASE directory with the same name but with a file extension of BAK instead of DBF: rename it (in Windows Explorer) as *.DBF; if there is no such file, copy the Main File from backup.

If the problem occurred during matching, the most likely databases to be corrupted are MATCHES.MDF, MERGES.MDF in the Main File directory, PERFORM.DBF in the DATABASE directory, or MATCHES2.DBF and/or SETS.DBF in the MATCHIT or REPORT directories (although any other database could have been corrupted, depending on the operation being performed). Copy files as necessary from backup, or the matchIT install disk. matchIT databases also require index files with an extension of CDX. In some circumstances, databases can be okay but index files corrupted. If a CDX is missing (or corrupt) matchIT will report the error.

"INDEX DOES NOT MATCH DATABASE FILE. RECREATE INDEX"

and/or

"DATABASE IS NOT ORDERED"

Index files can be recreated by using the Database Utilities Recreate Index option. Database Utilities can be entered by selecting the appropriate icon in the matchIT program Group in Windows, or by selecting the Database Utilities option from the matchIT Tools menu.

If you can't load matchIT at all, try entering Database Utilities (from the program group). Then choose Check Files, from the Report menu.

When you have recovered all the corrupted files, you will need to start the run again from the beginning of the step at which the problem occurred.

Matching Problems

Overview of Matching Problems

When reporting matches or overlap between files, matchIT looks up the full details for each record involved by using its unique reference number as stored in the Matches or Merges database.

When investigating problems with matching, before doing anything else, browse the Main File and check that the imported data looks okay, including the derived fields such as NAME, NAME1

etc. The Key fields are fairly obscure, but they should not in general be blank. If they are, or if e.g. the NAME2 field is blank, it could be because you have not allocated the right field names to the data (or the Intelligent Setup Wizard has not correctly identified the fields). You should check in particular that the right names have been used for people's names – usually ADDRESSEE for a name keyed all in one field and PREFIX, FORENAMES (or INITIALS), SURNAME when they are split up.

Too Few Matches or Scores Too Low

Possible causes of these problems are:

- the Minimum Score to Report is too high
- the Weights are poor, or are placed on un-normalised fields such as Addressee
- the primary Match Keys you have used have caused matchIT not to look at some potential duplicates e.g. you have used NAME_KEY + POSTCODE in one step, instead of POSTCODE in one step and NAME_KEY or NAME_KEY + POST_OUT in another step, or you have used an un-normalised field as a primary match key, such as Addressee
- you may have Match on Location set on in "[Matching Setup](#)" when you don't want to use it. If you want to consider matches based on e.g. contact and company names irrespective of location (address and postcode), you should uncheck this box.
- although you did more than one Find pass through the data, with different keys, you said "Yes" to "Is this a new Analysis" on the second pass, when you should have said "No."

If you still can't resolve the problem, find two records which should be reported as duplicates and contact your support team or your support provider.

Too Many Matches or Scores too High

Some of the checks above are worth looking at, in case the problem is the reverse of that described above. You may also benefit from using primary Match Keys that do not allow some of the false matches to be reported (e.g. where records are being reported because they match on name and have a blank postcode, but the addresses are different, use POST_OUT + NAME1 starting at postcodes beginning with 'A', instead of NAME1 + POST_OUT).

If you are dealing with foreign data (not from an English-speaking country), you may need to add common words to the [Names and Words](#) table to stop matchIT from paying any or too much attention to them when comparing records e.g. add Weg as an **Address** word for Holland and the Scandinavian countries.

If this does not solve the problem, see the section below.

Totally False Matches Being Reported

Possible causes of this are:

(a) Unique References are not Unique

If when you merge two databases and then View Matches or View Overlap, records are displayed with no similarities whatsoever, it is possible that the records do not have unique entries in the UNIQUE_REF field. You can check the unique references by using Database Utilities, Check Unique Refs. If this field was not allocated by matchIT on Import, rename your input field as

some other name (URN will do) and define a new field for UNIQUE_REF and matchIT will allocate references that are unique.

When you import two databases for merging, be sure to start the next reference number in the second database higher than the last record number in the first database e.g. if the unique reference number of the last record in the first database is 5000, the next record number of the second database needs to be greater than 5000.

If you have merged databases together and forgotten to give them unique references when originally importing them, you can use the Database Utilities option [Generate Unique Refs](#) to regenerate them. You must then Find Matches or Find Overlap again to find the matches for the new reference numbers.

If this happened in a Job Script, make sure that you set the Next Reference Number in the Options (Input Options) for each step, so that each database has a unique range of references, or use the Multiple File Wizard which ensures uniqueness.

(b) Inappropriate Report

Alternately, the problem could be due to having selected the wrong report. When choosing a report, make sure you select one appropriate to the options you have defined. If using one of matchIT's predefined reports, a sets report, for example, must contain the word 'SETS' in its name. Similarly, a pairs report must contain 'PAIRS' and an overlap report, 'MERGE'. Also, if you have found matches to business level, check you have chosen Business in the Report Format drop down list (View Matches dialog).

If you are using a report that you have modified, the report may be corrupt. It is worthwhile checking whether you have the same problem using the standard Business or Residential report, as delivered.

(c) Indexing Problems

Otherwise, it could be caused by an indexing problem. Check this by selecting Browse Imported Records from the Import menu and ordering it on UNIQUE REF. If the unique reference numbers are not progressive the Index is corrupt. Solve this by using the Database Utility option, Reindex to reindex the Main File(s).

(d) Find matches before you view them

matchIT may display completely false matches, with no similarities whatsoever if you select View Matches before you Find Matches. The reason is that matchIT retains information from the last matching runs that took place for a Main File in that directory.

Frequently Asked Questions

The Frequently Asked Questions option is located in matchIT's Help menu. The FAQ page is updated regularly.

Technical Support

If you are unable to find the answers you need in the Online Help or on our web site (especially in the "Frequently Asked Questions" area) or the documentation provided, please contact our support desk.

Further Information

Getting Started Guide

The matchIT Getting Started Guide is supplied to help new users become familiar with matchIT's main functions. We recommend that all new users work through this guide to gain familiarity with the matchIT environment and basic use of the system. If you don't have a hard copy, you can print the Getting Started Guide as it is available in Adobe Acrobat PDF format from the matchIT Help menu – you can obtain the Acrobat Reader software from Adobe's web site, www.adobe.com.

Online Help

More detail on some topics is given in the Online Help, to provide further information about advanced use of matchIT and the many parameters which can be manipulated. This is recommended for users who are familiar with matchIT and wish to learn about its advanced features, as well as for referencing when you want to configure matchIT for a specific task.

Additional Modules/Licenes

matchIT can be easily expanded to accommodate different requirements. Some of these additional features you may have already noticed from sections of this manual. To find the level of matchIT installed, choose about matchIT from the Help menu.

Additional user licenes are also available, at a reduced rate for each additional licene.

For further information or to discuss your requirements, please contact your supplier (see "[Contact Us](#)" below).

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Appendix

Appendix A - Field Names & Usage

The section after this lists field names by their type of usage.

Field Name	Width	Description	Examples	Input	Matching	Mail sort	Notes	Generated
ADDRESS1		The first or only line of address	Address1 can contain the whole address e.g. with each line separated by a comma	Yes	Yes	Yes	You must have at least one address line for matching and for Mailsort.	Cased or replaced by data from Postal Addresses File
ADDRESS2-9		The second and subsequent lines of address		Optional	Optional	Optional	matchIT does not expect any structure to the address, so it is usually best to label all the address lines as Address1 through AddressN (maximum of 9 lines), even if you know that e.g. the third address line is the town and the fourth the county.	Cased or replaced by data from Postal Addresses File
ADDRESSEE		Free form personal name in one field, as used in addressing mail.	MR G.C. SMITH Geoff Smith Esq. Mr G. Smith & Miss S. Brown	Optional	Optional	No	If this field mostly contains personal names, with some company names or job titles, label it Addressee. This field can be generated from Prefix,	Cased or generated from Prefix, Forenames, Surname

							Forenames and Surname.	
ADD_KEY	8	This is a key derived by matchIT for use in matching, to pick up matches where postcode does not match or it is non-UK data. By default, it is an 8 byte field, of which the first four characters represent the phonetic key of the town/city and the second four characters the street.	"bkymlymt" for a phonetic key of "The Cottage", 8 Lime-Tree Close, Gt. Bookham, Leatherhead, Surrey. THECOTTAGE 8LIMET- REECLOSEGT BOOKHA- MLEATHERHE ADSURREY for a non-phonetic key.	No	Recommended	No	See "Use Fast Address Key" in the Online Help.	Yes
BAR_CODE	12	This is the Customer Barcode required for Mailsort CBC, which contains the postcode plus DPS plus a	(KT228DY3DW)	Optional	No	Yes (for CBC)		Generated from Postcode and DPS

		check character. The field is prefaced with a left bracket (and terminated with a right bracket) which are the start and stop bits for the Royal Mail Four State Customer Code.						
BASE_SCORE	10	BASE_SCORE is the lowest matching score for a matching pair or a group of matching pairs.	105 98 130	No	No	No	A group of matching records will have the same BASE_SCORE.	Generated from the matchIT Weights table
COMPANY		A company or business name.		Optional	Optional	No	matchIT can move some company names from the Addressee or an address line to the Company field.	Cased or moved from Address see or address
CONTACT	40 min	This is a form of the person's name that is suitable for addressing envelopes.	Mr S Brown Dr J A Baker MSc	No	No	No		Generated from the individual's name
COUNT	30	Country	USA	Optional	No	Optional	matchIT can	Cased

RY			United Kingdom Australia	Optional		Optional	move or copy countries from an address line to the Country field. Mailsort processing uses this field.	or generated from address lines
COUNTY	30	UK County		Optional	No	No	matchIT can move or copy valid UK counties from an address line to the Town field.	Cased or generated from address lines
COY_KEY	5	Match key field consisting by default of the phonetic key of the first key word in the business name.		No	Optional	No	This field widens the choice of Match Keys if you are matching on both people and company names in the same run.	Yes
COY_NAME	40	Standardized form of the business name in upper case, used for matching.	IBM,, SMITH,KLINE, BEECHAM MINISTRY,DE FENCE,	No	Yes	No	Stored as follows: Surname, First Forename (or initial), Other forenames (or initials). Each of these will be separated by the Name Delimiter.	Yes
DEL_PRIORITY	10	DEL_PRIORITY is set to the Deletion Priority of each record in a match set upon deletion.		No	Optional	No	For more information, see Deletion Priorities.	Yes
DEPARTMENT		Department name		Optional	No	No	No special processing by matchIT other than	Can be cased

							casing.	
DPS	3	This is the Delivery Point Suffix required for the Customer Barcoding Mailsort service (CBC or Mailsort 700) for extra Mailsort discount . This is a 2 character field followed by a check character.	3G 3GU(with check character)	Optional	Optional	CBC	If only the two character DPS is input, the check character is derived.	Can be generated by addressesIT
FLAG	20	Populated during Import or Generate Keys for use by the Data Summary and View Records By Category menu options.		No	No	No	Each position in the FLAG field specifies a different property for that record – the properties and values are listed at the end of this section.	Yes
FORENAMES		Forenames (or Christian names) or initials in one field.	J, JR, J R, John Robert, John R	Optional	Optional	No	matchIT will generate Forenames from information contained in an Addressee field if present.	Cased or generated from Address see
FORENAMES2		Forenames for second name.	Similar to FORENAMES	No	Optional	No	matchIT will generate Forenames2 from the	Generated from Address see

							second name contained in an Addressee field if present.	
INITIALS		Initials of either just the middle forename(s), or of all the forenames.	Where the name of the person is John R Smith: JR or J R if FORENAMES is not present or empty. R if FORENAMES contains John.	Optional	Optional	No	If Forenames contains initials, they will be moved into the INITIALS field if present.	Generated from Addressee or Forenames
INITIALS2		Initials of either just the middle forename(s), or of all the forenames, for a second name.	As for INITIALS	Optional	Optional	No		Generated from Addressee
JOB_TITLE		A job title or department name.		Optional	Optional	No	matchIT can move some job titles or department names from the Addressee or an address line to the Job_Title field.	Cased or moved from Addressee or address
MAILING_ID	10	This field will be set to the campaign identifier entered in the Output Campaign Options window, for every record included in the output		User specified	No	No	matchIT Campaign only	

		file, or for which a label was printed or letter produced.						
MAIL_DATE	Date	This field will be set to the mailing date entered in the Output options window, for every record included in the output file, or for which a label was printed or letter produced.		User specified	No	No	matchIT Campaign only	
MATCH_REF	Same as Unique_Ref	When you Flag Matches, MATCH_REF is populated with the UNIQUE_REF of the record that is retained from every set of matching records (a "duplicate	If records 124, 318 and 960 are in the same match set and following the normal deletion rules, record 318 is deemed to be the record to keep, MATCH_REF will be set to 318 for all 3 records in the set.	No	Optional	No	For records that are not part of match sets, the MATCH_REF is set to the UNIQUE_REF. MATCH_REF is not populated by merge/purge processing unless you use the Multiple File Wizard.	Yes

		te group"). Alternat ively, Group Matches from the matchin g menu just populate s MATC H_REF.						
MS_SEL CODE	5-30	The Mailsort Selectio n Code, generate d from the postcod e (or from the town in the address lines if there is no valid postcod e).	15541 for ordinary Mailsort 15540 for CBC 1150 VIENNA for International Sorted	No	No	Yes	For most Mailsort and Presstream services, this is a 5 digit code. For Customer Barcoding, it is 4 digits followed by a zero. As the selection code is generated on Import or Generate Keys, the right type of Mailsort service must be selected before the Import or Generate Keys step.	Yes
NAME	40	Standar dized form of the personal name in upper case, used for matchin g.	KELLY,JOHN, PATRICK SMITH,G,C TREVOR- ROPER, HUGH, FISCHER,HAN S, & BRAUN,MARI NA,	No	Yes	No	Stored as follows: Surname, First Forename (or initial), Other forenames (or initials). Each of these will be separated by the Name Delimiter.	Yes
NAME1	5	Standar dized, usually phonetic , form of the surname or first key	dymym D545 DENHOLM depending on the phonetic matching option chosen.	No	Yes	No	This is used as a component of Match Keys for either Personal (individual, family or contact) or	Yes

		word in the company name.					Business matching.	
NAME2	5	Standardized, usually phonetic, form of the first forename, or its initial or the second key word in the company name.	Similar to NAME1	No	Yes	No	For personal matching, this can be replaced by an equivalent form of the forename e.g. Anthony instead of Tony, or a phonetic key of Anthony.	Yes
NAME2-FOUND	1	An indicator of whether the first forename in the Input record is in the NAMES table.		No	Yes	No	If the first forename in the Input record is in the NAMES table for the sex, NAME2FOUND will be set to "Y". If it seems to be inconsistent with the SEX or PREFIX for that record, it will be set to "X".	Yes
NAME3	1	Standardized, usually phonetic, form of the second forename, or its initial or the third key word in the company name.		No	Yes	No	Defaults to one character wide so it matches "middle names" just on their initial.	
NAME_KEY	6	Match key field consisting by default		No	Optional	No	This field makes the choice of Match Keys simpler.	Yes

		of NAME1 plus the first characte r of NAME2						
POSTC ODE	8 min	Usually contains a full UK postcod e.	GU14 7BQ W1A 1AA E3 5HD KT228DY	Opti onal	Optiona l	Yes	matchIT can extract (i.e. move) valid UK postcodes from an address line to the Postcode field.	From address lines or from Postal Address s File
POST_I N	3	The inward (last) part of a UK postcod e, which denotes e.g. part of a street.	7BQ	Opti onal	Optiona l	Yes	Can be used as part of a compound match key e.g. POST_IN+N AME_KEY	Generat ed from POSTC ODE, if not provide d
POST_O UT	4	The outward part of a UK postcod e, which usually denotes the town.	BN1 KT22 E3 WC2A	Opti onal	Optiona l	Yes	Can be used as part of a compound match key e.g. POST_OUT+ NAME1	Generat ed from POSTC ODE, if not provide d
PREFIX	10 min	Personal title	Mr Mrs Dr Professor	Opti onal	Optiona l	No	matchIT will generate Prefix from information contained in an Addressee field if present; otherwise it will try to deduce it from the forenames if present i.e. Mr or Ms.	Cased or generat ed from Address see
PREFIX 2	10 min	Personal title for second name	Similar to PREFIX	No	Optiona l	No	matchIT will generate Prefix2 from the second name contained in	Generat ed from Address see

							an Addressee field if present.	
PREMISE	10 min	The premise number part of the address – this is the building number, not the apartment or unit number if there is one.	260 2A 12-14	Optional	Optional	No	matchIT can move or copy some premise numbers from an address line to the Premise field.	Cased or generated from address lines
QUAL	10 min	A qualification or qualifications.	B.Sc., ARCS, BCom	Optional	No	No	matchIT will generate Qualification from information contained in an Addressee or Surname field if present.	Optional
QUAL_ADDR	2	Address quality score	3 9 5	Optional	No	No	matchIT assigned quality score for address information. See Address Quality .	Generated from address information.
QUAL_ORG	2	Organisation quality score	99 50 05	Optional	No	No	matchIT assigned quality score for Organisation information. See Organisation Quality .	Generated from Organisation information.
QUAL_INDIV	2	Name quality score	8 1 6	Optional	No	No	matchIT assigned quality score for Name information. See Name Quality .	Generated from Name information.
QUAL_EMAIL	2	Email quality score	9 0 2	Optional	No	No	matchIT assigned quality score for Email information.	Generated from Email information.

							See Email Quality .	
REST_PHONE	10 min	This is the local part of the telephone number, obtained by stripping out the area code (Std_code), spaces, punctuation characters and characters after the local number such as extension numbers.	360070 in (01372) 360070	Optional	Optional	No		Can be derived from the TELEPHONE field. It is useful as a match key either on its own or in conjunction with other fields
RES_SELECT	1	This is a 1-character field that denotes the Mailsort category the record was finally sorted into.	0, 1, 9, F, G	No	No	Yes	Possible values for this field are 0 (direct selection), 1 (residue selection) and 9 (not valid for use in Mailsort). In addition, F is used for non-UK records sorted for International Sorted discounts and G for non-UK records that are not eligible for discounts.	Yes
SALUTATION	40 min	This is a form of the person's name that is suitable	Dear Mr Brown	No	No	No		Generated from the individual's name

		for the top of the letter.						
SET_DUPS	5 numeric	If flagging match sets, SET_DUPS will contain the number of duplicates in a match set i.e. the number of records in the set less 1.		No	Optional	No	This field will be set to 0 if the record is unique, > 0 if the record is part of a match set.	Yes
SEX	1	The gender of the personal name, if present.	M, F or blank	Optional	Yes	No	matchIT uses this field in Individual matching if the corresponding Matching Option is set.	Generated from PREFIX or FORENAME, if not provided
STARTOFBAG	2	After the Mailsort step, this field is populated for each record that appears at the start of a new bag of mail. By default, it is populated with asterisks (**). This can be	**	No	No	Yes		Yes

		used to send a signal to a machine or to workers stuffing envelopes, to indicate the change of bag.						
STD_CODE	7	This is the area code for the telephone number.	01372 in (01372) 360070	Optional	Optional	No		Can be derived from the TELEPHONE field
SUFFIX	10 min	A title in a separate field following the surname.	Esq, Jr	Optional	Optional	No	matchIT will generate Suffix from information contained in an Addressee or Surname field if present.	Optional
SURNAME		The surname, typically when the name is split into component parts of Prefix, Forenames and Surname.	Smith, van der Valk	Optional	Optional	No	matchIT will generate Surname from information contained in an Addressee field if present.	Cased or generated from Address see
TELEPHONE		Telephone number	01372 360070 (01372) 360070 01372-360070	Optional	Optional	No	matchIT can split telephone numbers into two parts: STD_CODE for the area code and REST_PHONE for the local part of the number. The user can	No

							then effectively use REST_PHON E for matching.	
TOWN	30	UK town as identified by the Royal Mail Mailsort table.		Optional	No	No	matchIT can move or copy valid UK towns from an address line to the Town field, but this is not recommended if you are matching or Mailsorting.	From address lines
UNIQUE_REF	15 max	This field must be a unique key to the imported Main File record and must be of character type.		Optional	Yes	No	If you don't have unique reference numbers in the input file, matchIT allocates them sequentially.	Optional
ZIP	10 min	Usually contains a non-UK zip or other postal code.	US: 60010, 60010-5238 Australia: 2060 Canada: N1P4N4	Optional	Optional	No	matchIT can move or copy some non-UK zip (postal) codes from an address line to the Zip field	From address lines

Appendix B - Flag Field

Pos	Flag Name	Values
1	Exclusion Status (see Note at bottom of the table)	X if exclusion words are found, blank otherwise
2	Company Extracted	C if company name has been extracted
3	Company Acronym	This is set to 1,2 or 3 if any part of the company name is an acronym
4	Job Title/ Department	J if job title extracted, D if department extracted
5	Verified Postcode	V if postcode was verified OK
6	Extracted Postcode	E if postcode was extracted OK
7	Address/postcode verification result	<i>addressIT</i> only: E - Error, C - Changed postcode G - Generated postcode, S - same postcode, I - used input postcode blank - addressIT not enabled/available
8	Generated Prefix status	P - generated prefix, Q - changed prefix, S - used supplied prefix blank - no personal name processing
9	Salutation status	S - default salutation generated G - non-default (success!) salutation generated blank - no salutation field
10	Original Initial	Set to the first letter of the input forename field
11	Original Initial #2	First letter of second input forename, if any
12	Second Name Sex	Set to sex of second name if supplied & possible to calculate

13	Foreign status	F if record is foreign
14	Postcode vs. Town Flag	X if postcode disagrees with post town
15	Key Generation Method	If Phonetic Address Key was used: B - business keys used, I - personal keys used If Fast Address Key was used: C - business keys used, J - personal keys used
16	Premise status	X if premise extracted, C if premise copied
17	Zip status	X if zip extracted, C if zip copied
18	Town status	X if town extracted, C if town copied
19	County status	X if county extracted, C if county copied
20	Country status	X if country extracted, C if country copied.

There is a setting in Basic Parameters dictating how to treat exclusions. If it is set to Delete, these records will be deleted on Import. If it is set to Mail, they will not be deleted, but will have an 'X' placed in their Flag field.
