

SMS Merge Processing

Overview

The Merge Processing utility allows you to prepare a list of names and addresses to be merged into SMS's Individual file or the mailing file. Duplicates will be removed during the processing.

Each of the utility's options are described below. They are designed to be run in order from top to bottom because each step builds on the previous step. Some options have a button which displays either **Process** or **Done**. Process means that option has not been processed, while Done means it has been processed. The Maintain Merge Word Conversion File option allows you to maintain a list of words which can be converted to other words when necessary during the merge processing.

Any of the steps may be repeated until the desired results are achieved. Just remember to perform every step after the repeated step, in order.

Customer's source file

This option will define the source file to import data from. Select the source file's **Type** and then click the **BROWSE** button to locate and select the file. The selected file's path and name will be displayed.

Clear all prior merge processing

This option will reset all of the merge processing options to begin a new merge processing.

Import customer data

This option will import data from the defined customer's source file into the merge processing utility. The file structure must be as follows:

	Field name	Max length	Field description
1.	Title	25	Person's title
2.	Fname	50	Person's first name
3.	Mi	1	Person's middle initial
4.	Lname	50	Person's last name or organization's full name
5.	Addr1	50	Address line 1
6.	Addr2	50	Address line 2
7.	City	30	Address city
8.	St	2	Address state
9.	Zip	10	Address ZIP code

If your source file has all of the person's name in a single name field, you can use it that way in the Lname field just as you would for an organization's name.

The imported data will be truncated if its length is longer than the field's maximum length.

Analyze customer data

This option will build a single Name field from the name components and analyze data in all appropriate fields. The data in the name, addr1, addr2, and city fields will be analyzed for data that is too long. For each field where data is found to be too long, words are converted according to the merge word conversion file, and then any that remain too long will be displayed for you to manually shorten. Look at the window's title bar to see which field has been analyzed and what that field's length is. This option should be run repeatedly until no data is found to be too long.

All of the data will be displayed after the analysis is complete so that you can review the results and make any other desired changes to the data.

Standardize customer data

This option will prepare the customer's data for address postal encoding and standardization. Process this option, then, if you have postal processing software, use it to standardize the data. If you don't have it, we, at Sonova, can standardize your data for you.

Store standardized customer data

This option retrieves and stores the standardized data.

Remove duplicates compared to Individual or Mail Processing

This option will search for and remove duplicates from the customer's data when compared to either the Individual file or the Mail Processing file. (The Mail Processing file is the address file generated in step 1 of the Process Regular Issue Mailing utility.)

You have the option to include or exclude the name in the duplicate comparison. If you are primarily concerned with mailing the publication to 'individuals', include the name. If you are primarily concerned with 'addresses', do not include the name.

You have the option to also search for duplicates within the customer's data.

This option may be run several times using different processing options until you achieve the desired results. It is generally recommended that you run this option several times using every combination of options, recording the results of each run. Then run it one final time using the option configuration which gave you the results you want.

Output non-duplicate data for Mail Processing or Other

This option outputs non-duplicate data for mail processing or other purposes. If you select the Mail Processing option, you will have the option to append the data to the Mail Processing file used in the Process Regular Issue Mailing utility.

Standardize all data to create a new CASS report

This option combines the data from SMS's Individual file with the non-duplicate data from the merge processing to allow you to standardize all of the data together to generate a single CASS report to submit to the Post Office with the mailing.

WARNING: Postal rules specify that data is to be postal encoded prior to presort processing. All of your data should have been standardized in steps performed prior to this step. This option only combines data for re-standardizing to get a single combined CASS report.

Maintain Merge Word Conversion File

This option allows you to maintain a list of words which may be changed and shortened during the merge processing. You may enter as many records as desired. A word may be a single word or multiple words. The word must match exactly, including upper and lower case letters, for it to be converted.

Old word: The existing word.

New word: The word to convert the old word to.

Where: The fields where the found old word may be converted.

Sequence: The order in which to check for old words. Assign different sequence values to each record if you want to control the order in which the words are converted.

How do I merge data into a mailing?

Here are the steps to perform when merging data into a mailing:

1. Perform all of the steps down to and including the 'Store standardized customer data' step. This can be done any time prior to the mail processing. This may take some time so we recommend that it is done before step 2 listed below.
2. Perform step 1 of the Process Regular Issue Mailing utility.
3. Complete the remaining steps in the Merge Processing utility.
4. Complete the remaining steps in the Process Regular Issue Mailing utility.