

Merge data

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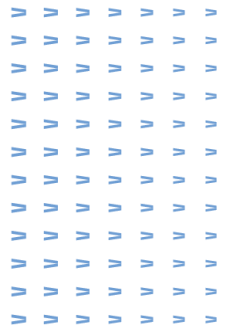
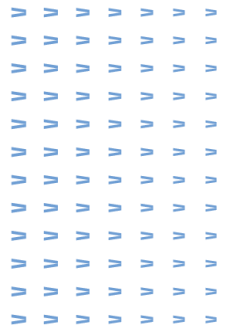


Table of contents

1	MERGE DATA.....	2
1.1	BATCH CUSTOMERS.....	2
1.2	CUSTOMERS MANUAL	5
1.3	POSTCODES.....	7
1.4	PAYMENT METHODS.....	9
1.5	COUNTRIES.....	9



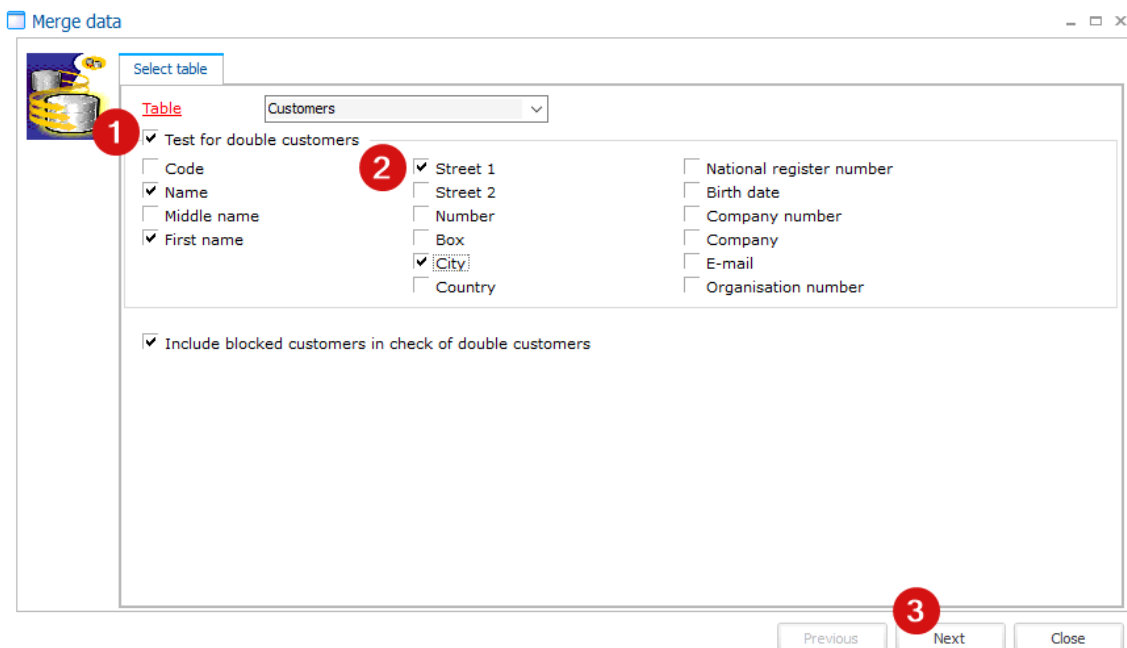
1 Merge data

In Recreatex, it is possible to merge certain data, namely customers, postcode, payment methods and countries.

Data merging is a convenient way to clean up certain things without losing any data if existing records with correct data are also modified.

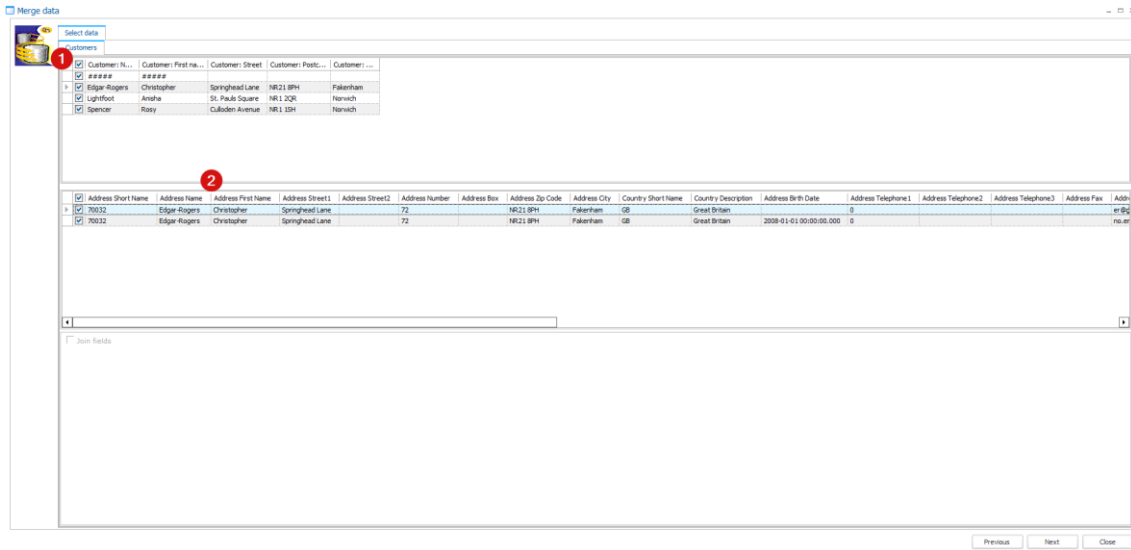
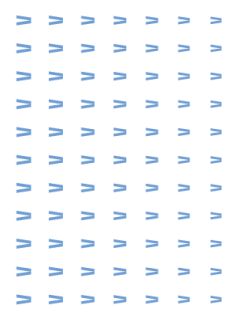
1.1 Batch customers

Go to system - processing - merge data - check the box on test for double customers and choose the desired fields to test on.



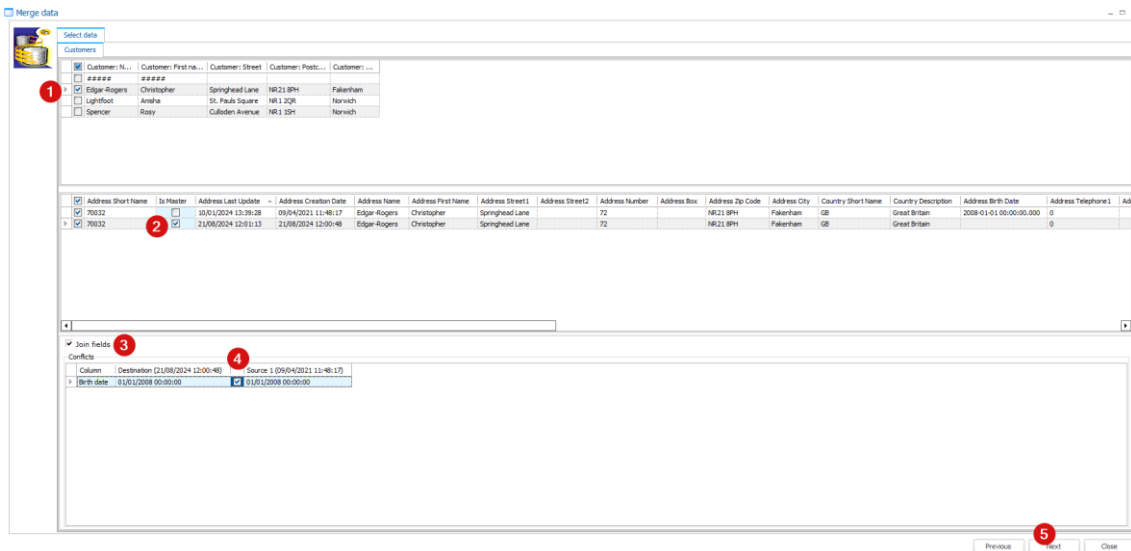
Then click next to run the test.

In the result of the duplicate client test, at the top you are going to uncheck everything (1).

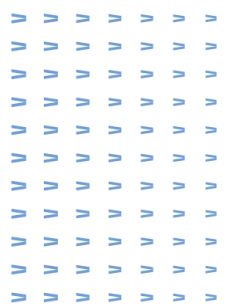


Using framework skills, you are going to set the columns properly in the middle piece. (this is remembered under your user settings, so you only have to do it once)

If your columns are well and clearly sorted, click the first customer in the first box, click 'is master'(2) in the second box, then click merge fields (3) and decide which field to take to the destination (4), if any.

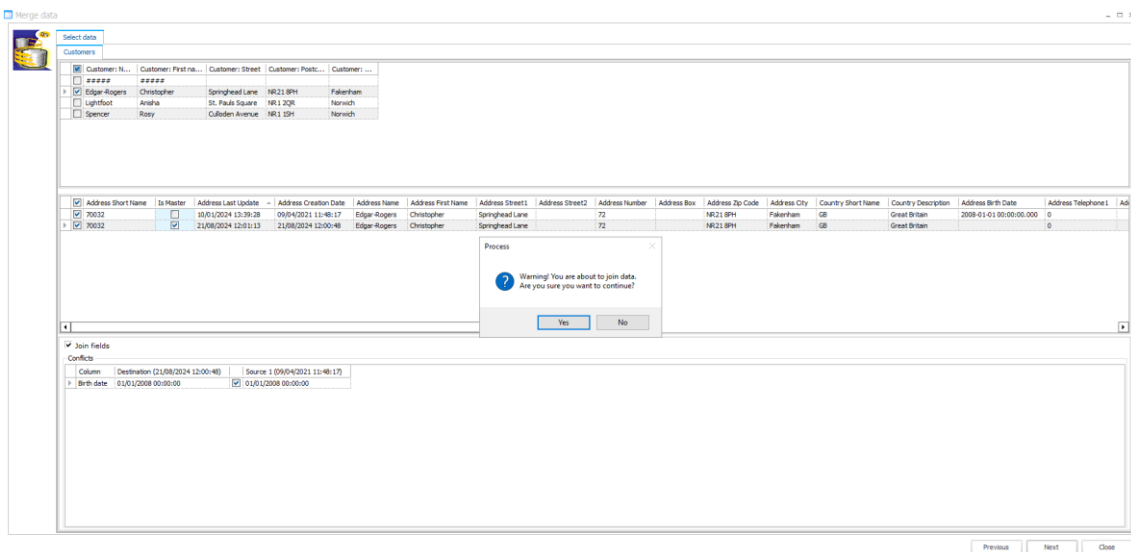


Is master is the destination address card, this is the card with the most info or the most recent info or the address card that the address logs in with online. So be sure to check in the overview which address card Is master, this will possibly provide less work when merging fields as well as the customer will certainly not experience any problem when logging into the webshop.

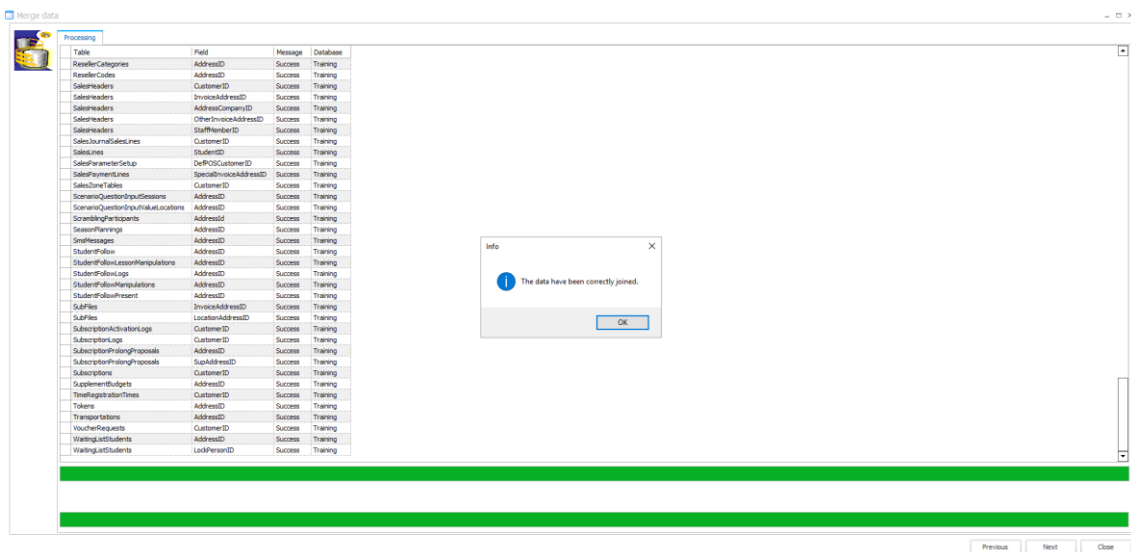


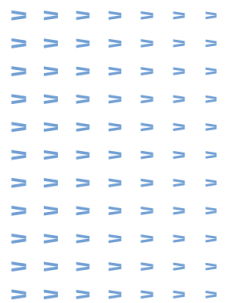
It is possible to go over several clients at once before clicking next to merge them (5). But small tip, only do a few clients at a time.

The moment you click next, the system gives a warning, so you can't accidentally merge a client.



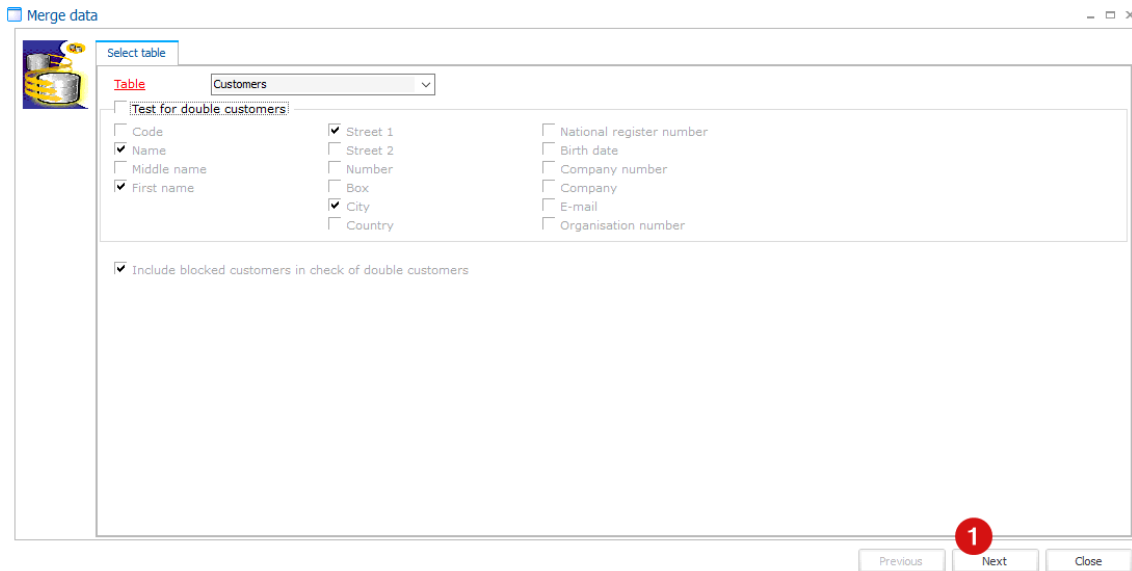
While the process of merging is at work, you will see the green bars shifting at the bottom, once done you will also get a message from this.



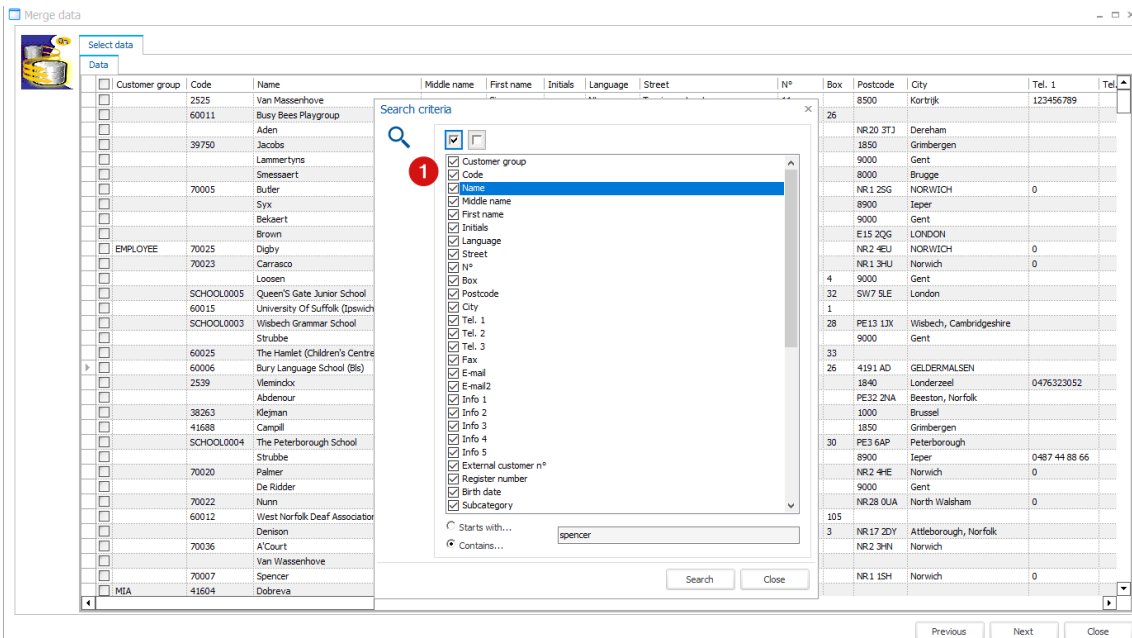


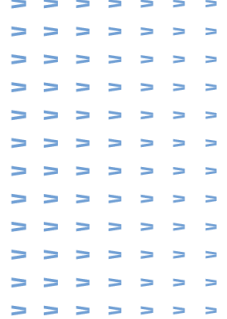
1.2 Customers manual

Go to system -processing -merge data -click directly on next without checking anything on.

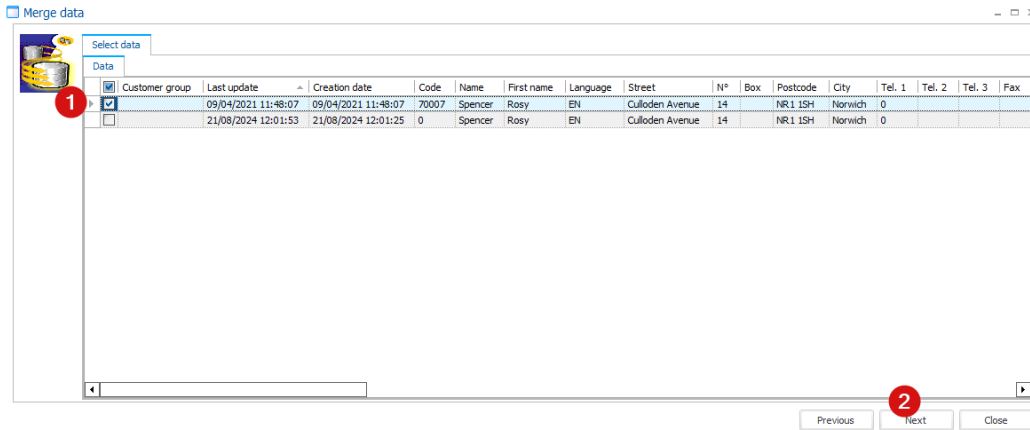


You will be given an overview of the entire customer database, here you will use framework skills to search behind the address card, this can be done for example by typing and searching by customer name.

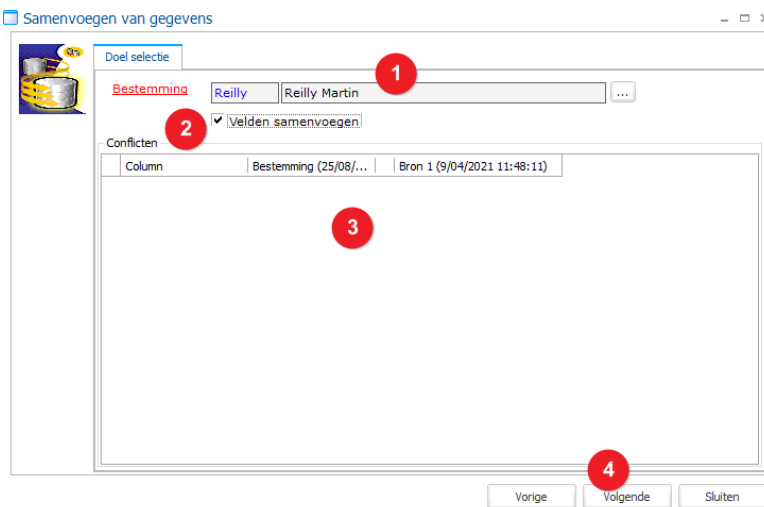




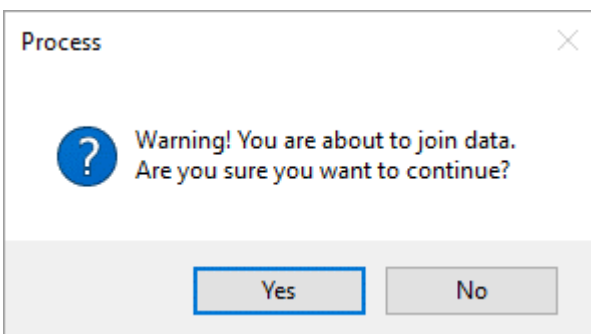
Check the address card you wish to merge, in this step you choose the outdated/least documented address card.

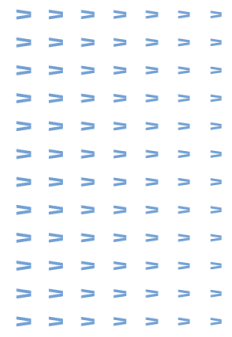


At destination you are going to look up the address card that will be the destination, the most recent or most documented address card. Check merge fields and check for any conflicts.

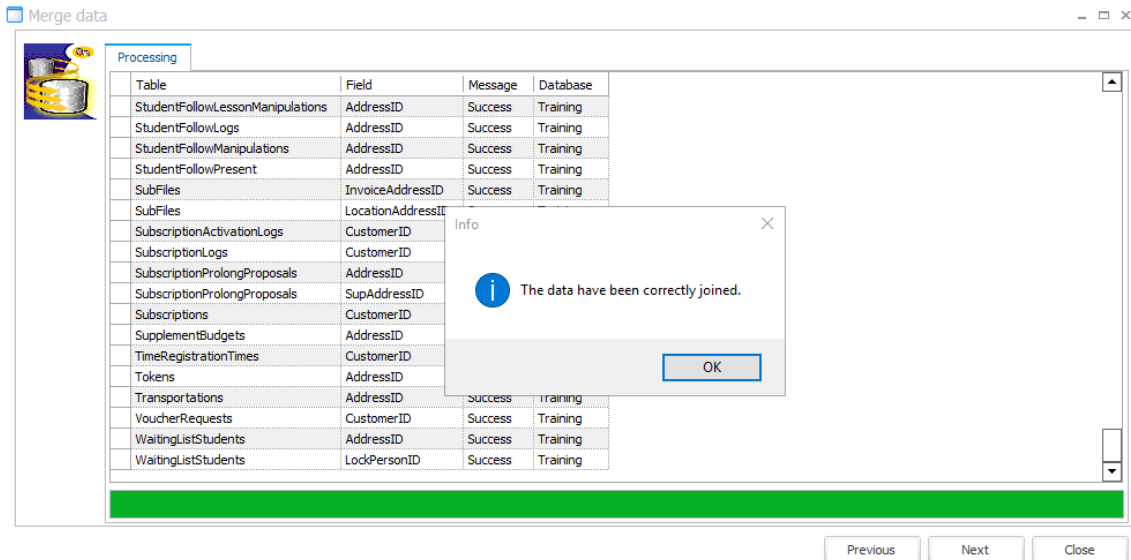


The moment you click next, the system gives a warning, so you can't accidentally merge an address card.



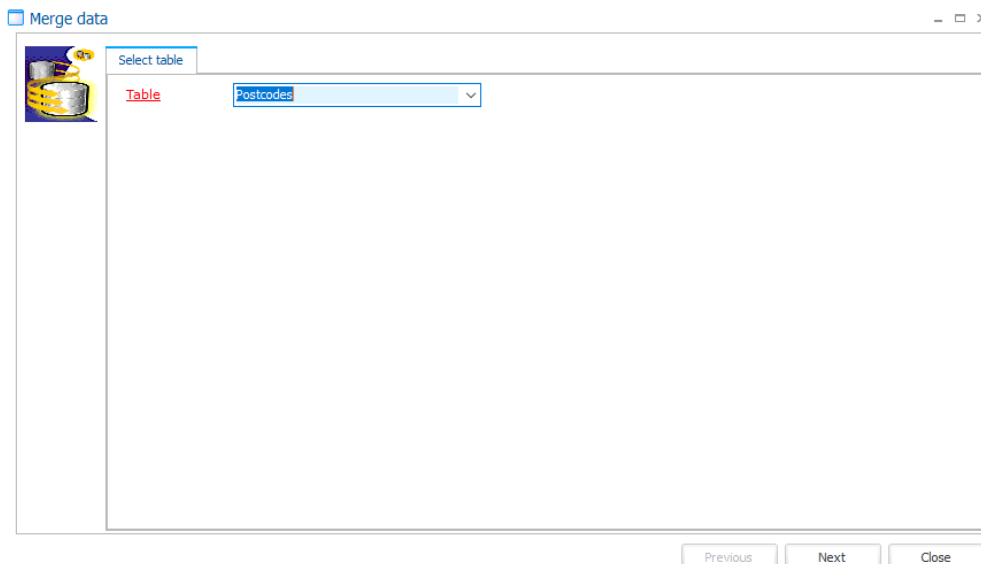


While the process of merging is at work, you will see the green bar shifting at the bottom, once done you will also get a message from this.

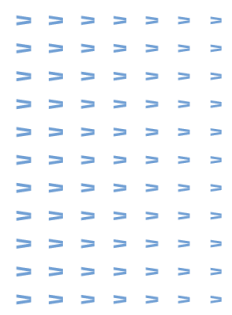


1.3 Postcodes

Go to system - processing - merge data - under table choose postcodes.



You get an overview of the entire postal code file, here you will use the framework skills to search behind the postcode, this can be done for example by typing and searching by name of the city.



Check the postcodes you wish to merge (may disappear).

Merge data

Select data
- □ ×

Data

<input type="checkbox"/>	Postcode	City	Last sync.	Last update	Web created	Default city	Country code	Country
<input type="checkbox"/>	NR 19 1FN	Yaxham		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	NR 19 1HR	Yaxham Road, Dereham		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	NR 19 1AB	YAXHAM, Dereham		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	NR 19 1RX	Yaxham, Dereham		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	NR 19 1SL	Yaxham, Dereham		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input checked="" type="checkbox"/>	NR 19 1QZ	Yaxham, Dereham		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	NR 19 1RD	Yaxham, Dereham		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	NR 19 1DT	Yaxham, Dereham		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	NR 19 1RU	Yaxham, Dereham		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	NR 19 1SB	Yaxham, Dereham		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	NR 19 1RQ	Yaxham, Dereham		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	IP23 8DB	Yaxley		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	IP23 8BT	Yaxley, Eye		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	IP23 8BX	Yaxley, Eye		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	IP23 8DA	Yaxley, Eye		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	NR 14 7PB	Yelverton		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	NR 14 7PB	Yelverton, Norwich		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain
<input type="checkbox"/>	NR 14 7PD	Yelverton, Norwich		08/04/2021 09:22:00	<input type="checkbox"/>	<input type="checkbox"/>	GB	Great Britain

Previous Next Close

At the destination you enter the postcode that becomes destination. Click next and the system will issue a warning.

Merge data

Select goal
- □ ×

Destination

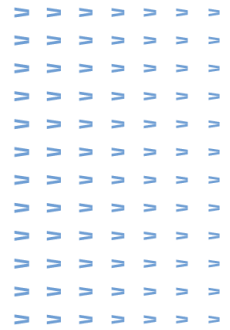
Process

?

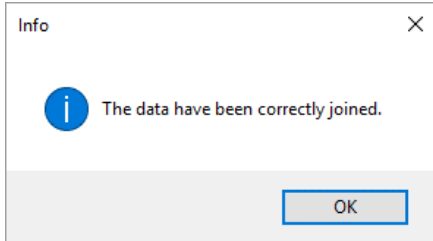
Warning! You are about to join data.
Are you sure you want to continue?

Yes
No

Previous Next Close

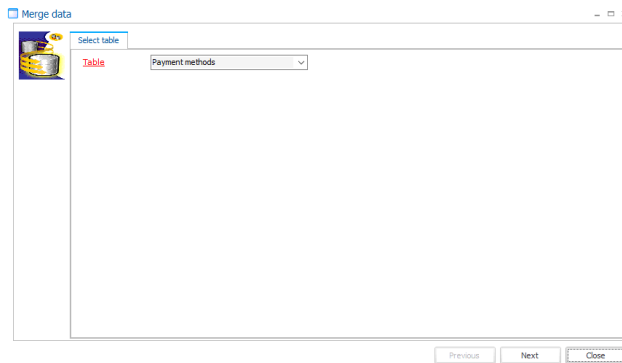


If the merge went well the system also reports it after the merge.



1.4 Payment methods

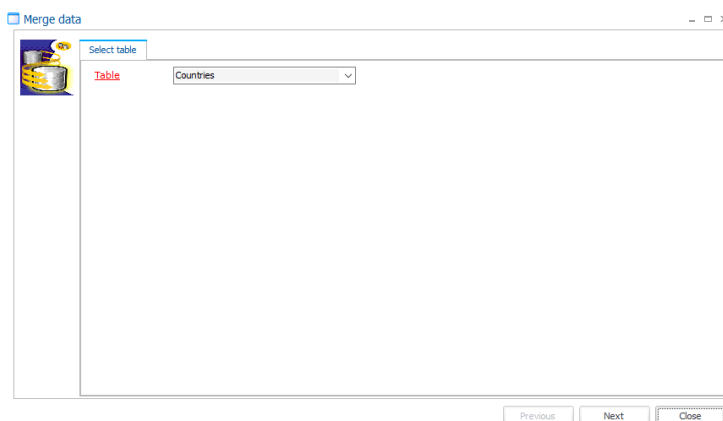
Go to system - processing - merge data - at table choose payment methods.



Identical same way of working as the postcodes merge.

1.5 Countries

Go to system - processing - merge data - under table choose countries.



Identical same way of working as the postcodes merge.