



Merge data

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vintia.com



How to merge data

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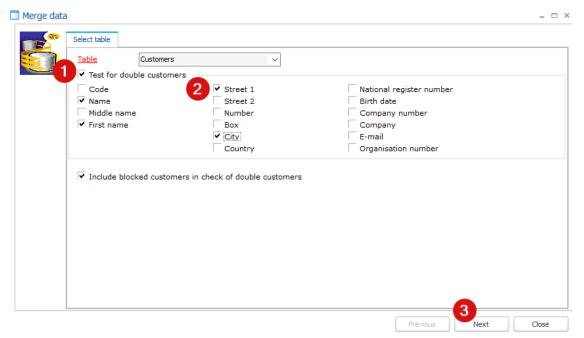
1 Merge data

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).

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Customers															
Customer: N	Customer: First na	Customer: Street	Customer: Postc	Customer:											
V =====	*****														
Edgar-Rogers	Christopher	Springhead Lane	NR218PH	Fakenham											
✓ Lightfoot		St. Pauls Square		Norwich											
Spencer	Rosy	Culloden Avenue	NR1 15H	Norwich											
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 Address Short 70032 	Edgar-Rogers		Springhead Lane		72	ADDress Dox	NR218PH	Fakenham	G8	Great Britain	Appress birth Date	Address Telephone 1	Address Telephone2	Address Telephone3	AD
70032	Edgar-Rogers		Springhead Lane		72		NR218PH	Fakenham	GB	Great Britain	2008-01-01 00:00:00.000	0			-
1															
■ □ Join fields]								

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.

Customers															
Customer: N	Customer: First na	Customer: Street	Customer: Postc	Customer:											

Edgar-Rogers		Springhead Lane		Fakenham											
Lightfoot	Anisha	St. Pauls Square		Norwich											
Spencer	Rosy	Culloden Avenue	INCI ISH	Norwich											
Address Short					Address First Name		Address Street2		Address Box						Address Telepi
70032		10/01/2024 13:39:28	09/04/2021 11:4		Christopher	Springhead Lane		72		NR218PH	Fakenham	G8	Great Britain	2008-01-01 00:00:00.000	0
> 70032	2	21/08/2024 12:01:13	21/08/2024 12:0	:48 Edgar-Rogers	Christopher	Springhead Lane		72		NR218PH	Fakenham	G8	Great Britain		0
	•														
•															
Join fields 3															
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✓ Join fields 3 Conflicts	stination (21/08/2024 1	500:48) Source	e 1 (09/04/2021 11:-40 /2008 06:00:00	17)											
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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.



How to merge data

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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.

Select data															
Customers															
	Customer: First na.	Customer: Street	Customer: Postc	Customer:											

Edgar-Rogers	Christopher	Springhead Lane		Fakenham											
Lightfoot	Anisha	St. Pauls Square		Norwich											
Spencer	Rosy	Culloden Avenue	NR1 1SH	Norwich											
Address Short I	Name Is Master	Address Last Update	+ Address Creation	Date Address Nam	e Address First Name	Address Street1	Address Street2	Address Number	Address Box	Address Zip Code	Address Oty	Country Short Name	Country Description	Address Birth Date	Address Tel
70032		10/01/2024 13:39:28	09/04/2021 11:48	17 Edgar-Rogers	Christopher	Springhead Lane		72		NR218PH	Fakenham	G8	Great Britain	2008-01-01 00:00:00.000	0
70032		21/08/2024 12:01:13	21/08/2024 12:00	:48 Edgar-Rogers	Christopher	Springhead Lane		72		NR218PH	Fakenham	G8	Great Britain		0
						? Wa	rning! You are abo you sure you wan	ut to join data. t to continue?							
						? Wa	you sure you wan	t to continue?							
1						? Wa	rning! You are abo you sure you wan Yes	ut to join data. t to continue? No							
						? Wa	you sure you wan	t to continue?							
Join fields Conflicts						? Wa	you sure you wan	t to continue?							
Join fields	Stration (21/08/2024 12	2:00:48) Source	# 1 (09/04/2021 11:48	:17)		? Wa	you sure you wan	t to continue?							
Join fields			n 1(09/04/2021 11:48 /2008 00:00:00	:17)		? Wa	you sure you wan	t to continue?							
Join fields Conflicts Column Dest				:17)		Wase	you sure you wan	t to continue?							
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Join fields Conflicts Column Dest				117		We have	you sure you wan	t to continue?							

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.

Processing	1= 11	Lee.	le cr					
Table	Field	Message						
ResellerCategories	AddressID	Success	Training					
ResellerCodes	AddressID	Success	Training					
SalesHeaders	CustomerID	Success	Training					
SalesHeaders	InvoiceAddressID	Success	Training					
SalesHeaders	AddressCompanyID	Success	Training					
Salesheaders	OtherInvoiceAddressID	Success	Training					
SalesHeaders	StaffMemberID	Success	Training					
SalesJournalSalesLines	CustomerID	Success	Training					
SalesLines	StudentID	Success	Training					
SalesParameterSetup	DefPOSCustomerID	Success	Training					
SalesPaymentLines	Special@nvoiceAddress@D	Success	Training					
SalesZoneTables	CustomerID	Success	Training					
ScenarioQuestionInputSessions	AddressID		Training					
ScenarioQuestionInputValueLocations	AddressID	Success	Training					
ScramblingParticipants	AddressId	Success	Training					
SeasonPlannings	AddressID	Success	Training					
SmsMessages	AddressID	Success	Training	Info		×		
StudentFollow	AddressID	Success	Training					
StudentFollowLessonManipulations	AddressID	Success	Training					
StudentFollowLogs	AddressID	Success	Training		The data have been correctly joined.			
StudentFollowManipulations	AddressID	Success	Training		The data name been contectly junied.			
StudentFollowPresent	AddressID	Success	Training					
SubFiles SubFiles	InvoiceAddressID	Success	Training					
	LocationAddressID	Success	Training		OK			
SubscriptionActivationLogs	CustomerID	Success	Training			-		
SubscriptionLogs	CustomerID	Success	Training					
SubscriptionProlongProposals	AddressID	Success	Training					
SubscriptionProlongProposals	SupAddressID	Success	Training					
Subscriptions	CustomerID	Success	Training					
SupplementBudgets TimeRegistrationTimes	AddressID CustomerID	Success	Training					
TimeRegistrationTimes	AddressID	Success	Training					
Transportations	AddressID	Success	Training					
Transportations VoucherRequests	AddressID CustomerID	Success	Training					
	AddressID	Success	Training					
WaitingListStudents WaitingListStudents	AddressID LockPersonID	Success Success	Training					
Waitinguistotudents	LooversontD	Success	Traning					



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1.2 Customers manual

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

Select table			
Table Customers	~		
Test for double custom	ers		
Code	Street 1	National register number	
✓ Name	Street 2	Birth date	
Middle name	Number	Company number	
✓ First name	Box	Company	
	City	E-mail	
	Country	Organisation number	
▼ Include blocked custom	ers in check of double customers		
▼ Include blocked custon	ers in check of double customers		
▼ Include blocked custon	ers in check of double customers		
✓ Include blocked custom	ers in check of double customers		

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.

Data	1														
	Customer group	Code	Name	Middle	name Fi	irst name	Initials	Language	Street		N°	Box	Postcode	City	Tel. 1
		2525	Van Massenhove		-			1.4.0	· · ·		1		8500	Kortrijk	123456789
]	60011	Busy Bees Playgroup	Search criteria							×	26			
			Aden	Q. I									NR20 3TJ	Dereham	
]	39750	Jacobs	Q	7								1850	Grimbergen	
]		Lammertyns	- - F	Custome	r group					^		9000	Gent	
]		Smessaert		Code								8000	Brugge	
]	70005	Butler		Name								NR12SG	NORWICH	0
]		Syx		Middle na								8900	Ieper	
]		Bekaert		First nam	1e							9000	Gent	
]		Brown] Initials								E15 2QG	LONDON	
ΠĒ	EMPLOYEE	70025	Digby] Language] Street	e							NR2 4EU	NORWICH	0
]	70023	Carrasco] Nº								NR13HU	Norwich	0
]		Loosen	i i i	Box							4	9000	Gent	
		SCHOOL0005	Queen'S Gate Junior School	Ē	Postcode							32	SW7 5LE	London	
]	60015	University Of Suffolk (Ipswich		City							1			
	1	SCHOOL0003	Wisbech Grammar School		Tel. 1							28	PE13 1JX	Wisbech, Cambridgeshire	
	1		Strubbe	6	Tel. 2								9000	Gent	
		60025	The Hamlet (Children's Centre		Tel. 3							33			
ЪĒ	1	60006	Bury Language School (Bis)		Fax E-mail							26	4191 AD	GELDERMALSEN	
		2539	Vleminckx		E-mail2								1840	Londerzeel	04763230
]		Abdenour		Info 1								PE32 2NA	Beeston, Norfolk	
Ē	1	38263	Kleiman		Info 2								1000	Brussel	
		41688	Campil	Ē	Info 3								1850	Grimbergen	
		SCHOOL0004	The Peterborough School		Info 4							30	PE3 6AP	Peterborough	
			Strubbe		Info 5								8900	Ieper	0487 44 8
		70020	Palmer			customer n	•						NR2 4HE	Norwich	0
1 F			De Ridder		Register								9000	Gent	
1 E		70022	Nunn		Birth date								NR28 OUA	North Walsham	0
		60012	West Norfolk Deaf Association	6	-						~	105			
			Denison	0	Starts with	h						3	NR 17 2DY	Attleborough, Norfolk	
		700.36	A'Court	6	Contains.		spend	e				-	NR2 3HN	Norwich	
			Van Wassenhove												
Hb		70007	Spencer							earch	Close		NR1 1SH	Norwich	0
	MIA	41604	Dobreva						5	earcn	Close				



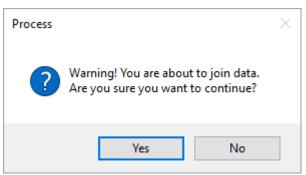
Check the address card you wish to merge, in this step you choose the outdated/least documented address card.

80 3	Select data														
n 🗌	Data														
	Customer group	Last update	Creation date	Code	Name	First name	Language	Street	N°	Box	Postcode	City	Tel. 1	Tel. 2	Tel.
1)	V	09/04/2021 11:48:07	09/04/2021 11:48:07	70007	Spencer	Rosy	EN	Culloden Avenue	14		NR1 1SH	Norwich	0		
		21/08/2024 12:01:53	21/08/2024 12:01:25	0	Spencer	Rosy	EN	Culloden Avenue	14		NR1 1SH	Norwich	0		
	d														

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.

Samenvoe	egen van gegeve	ns	- 🗆 ×
~	Doel selectie		
E	Bestemming	Reilly Reilly Martin	
	Conflicten 2	Velden samenvoegen	
	Column	Bestemming (25/08/ Bron 1 (9/04/2021 11:48:11)	
		3	
		4	
		Vorige Volgende	Sluiten

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.

	Table	Field	Message	Database				
	StudentFollowLessonManipulations	AddressID	Success	Training				
	StudentFollowLogs	AddressID	Success	Training				
	StudentFollowManipulations	AddressID	Success	Training				
	StudentFollowPresent	AddressID	Success	Training				
	SubFiles	InvoiceAddressID	Success	Training				
	SubFiles	LocationAddressI	1	_				
	SubscriptionActivationLogs	CustomerID	Info			\times		
	SubscriptionLogs	CustomerID						
	SubscriptionProlongProposals	AddressID						
	SubscriptionProlongProposals	SupAddressID	- (1) 1	lhe data have	been correctly joine	d.		
	Subscriptions	CustomerID						
	SupplementBudgets	AddressID						
	TimeRegistrationTimes	CustomerID				_		
	Tokens	AddressID			OK			
	Transportations	AddressID	Success	Iraining				
	VoucherRequests	CustomerID	Success	Training				
		AddressID	Success	Training				
	WaitingListStudents							

1.3 Postcodes

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

🗖 Merge data	3						- 🗆 ×
~~~~	Select table						
9	<u>Table</u>	Postcodes	~	/			
					Previous	Next	Close

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.



How to merge data

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

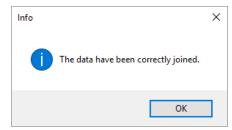
<u> </u>		ata								
	F	<b>&gt;</b>	Postcode	City	Last sync.	Last update	Web created	Default city	Country code	Country 4
			NR 19 1FN	Yaxham		08/04/2021 09:22:00			GB	Great Britain
			NR 19 1HR	Yaxham Road, Dereham		08/04/2021 09:22:00			GB	Great Britain
			NR 19 1AB	YAXHAM, Dereham		08/04/2021 09:22:00			GB	Great Britain
			NR 19 1RX	Yaxham, Dereham		08/04/2021 09:22:00			GB	Great Britain
			NR 19 1SL	Yaxham, Dereham		08/04/2021 09:22:00			GB	Great Britain
	F	~	NR 19 1QZ	Yaxham, Dereham		08/04/2021 09:22:00			GB	Great Britain
			NR 19 1RD	Yaxham, Dereham		08/04/2021 09:22:00			GB	Great Britain
			NR 19 1DT	Yaxham, Dereham		08/04/2021 09:22:00			GB	Great Britain
			NR 19 1RU	Yaxham, Dereham		08/04/2021 09:22:00			GB	Great Britain
			NR 19 1SB	Yaxham, Dereham		08/04/2021 09:22:00			GB	Great Britain
			NR 19 1RQ	Yaxham, Dereham		08/04/2021 09:22:00			GB	Great Britain
			IP23 8DB	Yaxley		08/04/2021 09:22:00			GB	Great Britain
			IP23 8BT	Yaxley, Eye		08/04/2021 09:22:00			GB	Great Britain
			IP23 8BX	Yaxley, Eye		08/04/2021 09:22:00			GB	Great Britain
			IP23 8DA	Yaxley, Eye		08/04/2021 09:22:00			GB	Great Britain
			NR 14 7PB	Yelverton		08/04/2021 09:22:00			GB	Great Britain
			NR 14 7PB	Yelverton, Norwich		08/04/2021 09:22:00			GB	Great Britain
			NR 14 7PD	Yelverton, Norwich		08/04/2021 09:22:00			GB	Great Britain
	F		DADO NT	Vil		00/04/2021 00-22-00				

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

🛄 Merge data	3							- 🗆 ×
	Select goal	NR19 1QZ Ya	xham, D	ereham				
			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

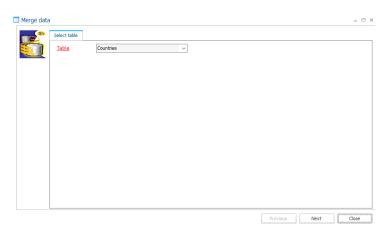
Go to system - processing - merge data - at table choose payment methods.

🗖 Merge dat	a		_ 🗆 ×
	Select table		
	Table	Payment methods 🗸 🗸	
		Device Mark	

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.