

eTapestry's Mass Duplicate Merge Process

What is it?

eTapestry recognizes that duplicate processing is a difficult and sometimes ugly process. Locating and eliminating duplicates is definitely not an exact science and can take hours upon hours to evaluate an entire database. Although it is never an easy project, duplicate processing is vital to obtain a clean dataset.

eTapestry has developed a Mass Duplicate Merge (MDM) service that will aid in this project. The MDM is processed using a custom export from eTapestry. The export can be processed on your entire eTapestry record set or a specific portion using a query of your choice. This will allow you to eliminate a certain group of records that do not need to be evaluated. Once the export file is provided to eTapestry, the MDM will programmatically locate as many duplicates as possible.

How does it work?

1. eTapestry personnel run the Mass Duplicate Merge export in eTapestry
2. eTapestry personnel run the duplicate location process. Duplicates are rated based on various criteria:

Account Name + Zip Code (*Standard*)

Account Name without special characters + zip code (*e.g. Bob Smith, Jr. = Bob Smith Jr.*)

Account name without titles (Mr., Mrs., Dr.) + Zip Code (*e.g. Mr. Bob Smith = Bob Smith*)

Account name without Middle initials + Zip Code (*e.g. Bob L. Smith = Bob Smith*)

(Note: Only the first five digits of the zip code are compared)

3. eTapestry personnel provide you with two Excel files:
 - a. Approval List—MDM results are supplied for the customer to review and authorize eTapestry to merge.
 - b. Client List—remaining records are supplied allowing the customer to locate additional duplicates by hand.
4. You email the two revised Excel files (Approval & Client List) to eTapestry
5. eTapestry personnel schedule a time with you to run the merge process on your eTapestry database. Relationships, Journal items, and account User Defined Field values will be merged into the selected record. All Persona data for the destination record will remain, and the other record will be deleted.

Summary

As you add records to your database, especially if you use a mass import function, it becomes more likely that your database will include duplicate records. Although eTapestry makes it easy to merge individual account records together, you may want an automated system to speed up the work for you. This process helps search and identify obvious duplicates and quickly merge the records without losing important donor coding or journal information

The cost for performing the Mass Duplicate Merge service is \$600 (USD) for up to 100,000 accounts evaluated. For more information, please contact eTapestry at 888-739-3827 or email info@etapestry.com.

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