Merging and Purging Client Profiles
Quick Reference Guide

Date: October 15

Introduction

After a time, Maestro can have a large number of duplicate Client Codes in Maestro. These are either client codes that were never used or duplicate codes for the same person/company, when only one is required. The Merge/Purge functions allow these codes to be removed from the system.

It is assumed that the reader of this document is familiar with the Maestro User Interface and Client Profile Management.

The Duplicate Client Merge is a multi-step process. Using Maestro to find possible matches, deciding which client profiles should be merged with which, and then review the list of merges to be made.
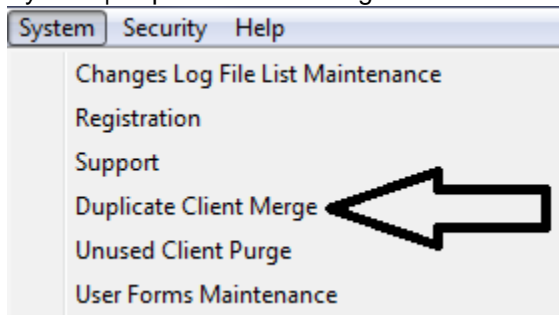
Procedure

Reset Duplicate Client Merge

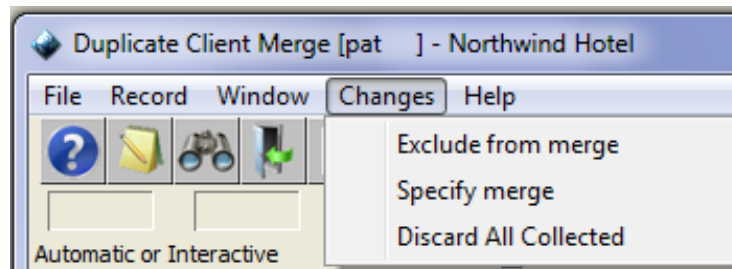*A COMPLETE BACKUP SHOULD BE TAKEN BEFORE THE DUPLICATE CLIENT MERGE IS EXECUTED*

The Duplicate Client Merge can be found in the Global Maintenance Module.

System | Duplicate Client Merge

Before the Duplicate Client Merge program is used, the Duplicate Client Merge must be reset.
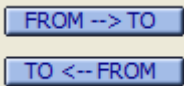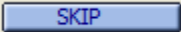
Changes | Discard All Collected

Maestro
PMS like no other.

Duplicate Client Merge

(A)utomatic or(I)nteractive	The Duplicate Client Merge can be executed in one of two methods;
Automatic or Interactive ___ (A or I) Type 'A' for Automatic OR Type 'I' for Interactive	Automatic: The program will find profiles that match based on the Match Criteria selected, the Client Profile with the lowest Client Code will be overwritten by the Client Profile with the highest Client Code. NOTE: In Automatic mode, the user will not be able to see or select the profiles that are being matched. Interactive: The user will be shown the matches and then can choose the direction of the merge or can exclude a client from the merge.
Match Criteria	Items that are used for comparisons of profiles. Select with a 'Y' or 'N' to show whether or not the item is to be used. The default for all 20 items is 'Y'
Comparing	The number of Match Criteria items that the user has selected.
Minimum Matched Req'd	The minimum number of the selected Match Criteria for Maestro to consider as a potential match. Users can set the number.
Neutral Comparisons Allowed	A neutral comparison is where a field is blank in one or both of the profiles being compared. If the field is blank in both profiles, it is not considered a match. Users can set the number.
Mismatches Allowed	A mismatch is when the values in the fields are different. If a field in both profiles is blank, it is considered a mismatch. Users can set the number.
Starting Name	The user can enter a name to start the merge at. Leave it blank to start from the beginning
Start Search	To start the search, type a 'Y' in the field. The program will start the scan and display matching client profiles.

Client	The Client Code and some fields from the Client Profile are displayed.
From/To [FROM --> TO] [TO <-- FROM]	Select how the profiles are merged. The arrows indicate the direction of the merge.
Skip [SKIP]	Allows the user to skip the displayed profiles and leave them unmerged
Matched	Running total of the number of profiles to be considered for merging
Merged	Running total of the number of merged profiles
Report	Produces a listing of all clients to be considered for merging. This report excludes the excluded Client Codes.
Finished	When the merge is complete, select the Finished button. Depending on the configuration of the .ini file, the Finished button will start running the scripts needed to complete Duplicate Client Merge. See section 2.6 for further information

For Maestro to maximize the number of potential matches, the combined total of Minimum Matches Req'd, Neutral Comparison Allowed and Mismatches Allowed must match the total number of Match Criteria selected.
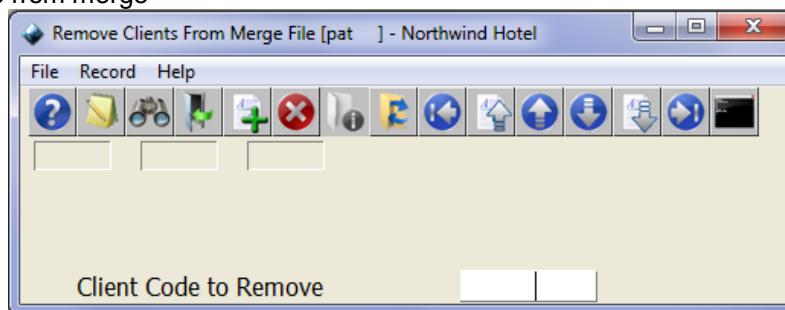
For a profile to qualify as a match, the last name must be an exact match. The first name, if given, must also match but if only an initial was entered it can be matched with a first name having the same initial. For example, Paul, W, would be considered a match for Paul, Wendy and Paul, Wayne.

Abbreviations are ignored for street names. For example, Wilson Street and Wilson St. will be considered for a match because Street and St. are ignored. The same can be said for Avenue and Ave., Road and Rd.

Excluding Clients

There will be Client Codes that users do not wish to merge. To prevent Client Codes from being shown and considered for a match, the user can exclude Client Codes from the Duplicate Client Merge.

Changes | Exclude from merge

The user can type in the client code to exclude from the matches. Press enter after inputting the Client Code to be excluded.
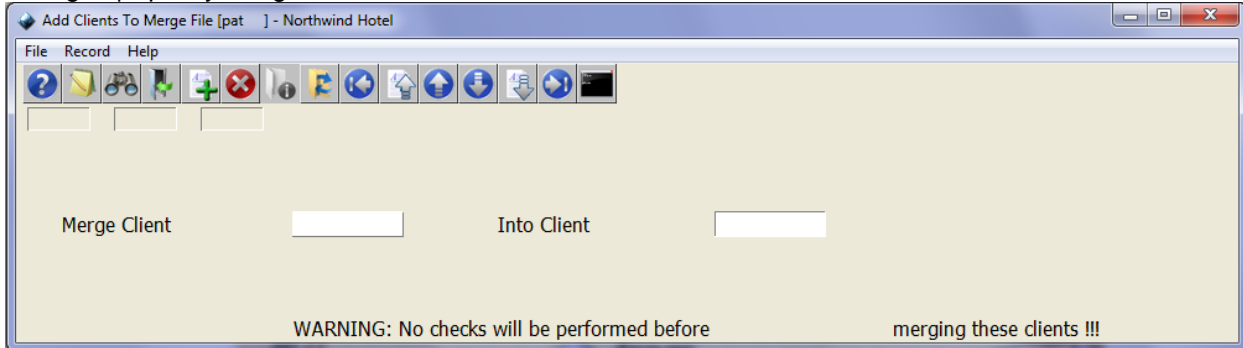
NOTE: The client will be excluded only until the next time the Duplicate Client Merge is started.

Merging Specific Client Codes on the Fly

Users can specify particular Client Codes to be merged if they have identified them by using external sources.
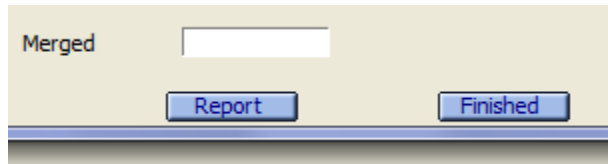
Changes | Specify Merge

NOTE: No checks will be performed before merging clients

Users will type the "extra" Client Code in the Merge Client field. The Merge Client Code will be overwritten by the Into Client code. After entering both Client Codes, press Enter.

Reporting

A report listing all merges can be accessed by pressing the Report button in the Duplicate Client Merge Screen.

It is recommended that the merged profiles are reviewed before selecting the Finished Button.

```
            GB4600      Northwind Hotel                    Page   1
                        CLIENT MERGE
Records on the left will be merged into the record on the right
--------------------------------------      --------------------------------------
ClientCd Name/Address                       ClientCd Name/Address

    817 LUONG, JENNY                            202 LUONG, JENNY
        10 Main Street                              20 Flower Street
                                                    Floor 404
        Beverly Hills, CA 90210                     Beverly Hills, CA 90210
        na                                          na

    798 MCKECHNIE, STUART                        787 MCKECHNIE, PROF STUART
        1234                                        123 Street

        Beverly Hills, CA 90210                     BEVERLY HILLS, CA 90210
        na                                          na


            CLIENTS TO BE MERGED          2

end of report
```

From the above example of the Duplicate Client Merge Report, Client Code 817, Luong, Jenny, will be overwritten by Client Code 202. Client Code 798, McKechnie, Stuart, will be overwritten by Client Code 787.
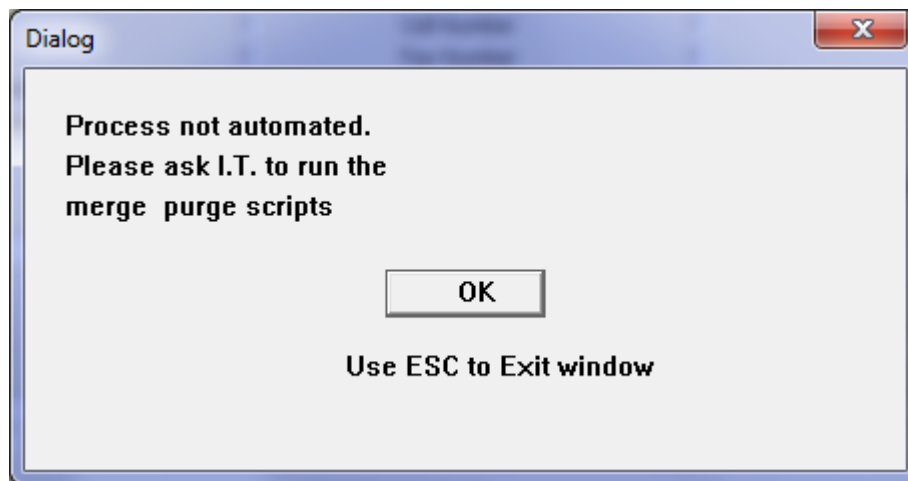
The Exclude from Merge and Specify Merge functions are still accessible when reviewing as long as the Finished button is not pressed.

Completing the Client Merge

Pressing the Finished button will complete the merge/purge depending on the setup at the property.

If the merge/purge scripts are configured to run automatically, a DOS window will appear when running the scripts and automatically close when finished.

If there is a problem running the scripts or if the scripts are not configured, then a dialogue box stating that IT be asked to run the scripts will display.

Configuration

To configure the script launcher

1. Contact Maestro Support for the SQL scripts that are needed to complete the merge/purge process.

2. Create a folder, preferably in N:, which will be used to store the SQL scripts.

3. Make sure you have the correct scripts for merge and purge as we are constantly updating scripts, therefore ensure to get the scripts as they are updated each year.

The merge script must be renamed as: maestro_merge_clients.sql
The purge script must be renamed as: maestro_purge_clients.sql

4. Add a new section to the .ini file.

```
[sql_scripts]
directory            n:\queries (name of the folder created in Step 1)
program              isql
confirmed
```