

## Merge/Purge Instructions

Merge/purges are complicated processes with many decision points. We do our best work when we know your needs and desires. You can also help us meet or beat your time requirement by filling in as much of this questionnaire as possible. If you have any questions, please do not hesitate to call Brian, Wesley or Bob. Thank you.

### WHO DO WE TALK TO?

Please list a contact person with phone and fax numbers:

\_\_\_\_\_

\_\_\_\_\_

Phone (     ) \_\_\_\_\_ - \_\_\_\_\_

Fax (     ) \_\_\_\_\_ - \_\_\_\_\_

### WHO GETS THE BILL?

List the contact, company, address, and phone number of the invoice recipient:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone (     ) \_\_\_\_\_ - \_\_\_\_\_

### WHO IS THE MAILER?

Enter the organization for which this merge/purge is being done:

\_\_\_\_\_

\_\_\_\_\_

### WHERE DO WE SHIP THE OUTPUT?

Please provide the contact, company, address, phone, and fax phone numbers of the recipient of the output (tape, labels, whatever):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone (     ) \_\_\_\_\_ - \_\_\_\_\_

Fax (     ) \_\_\_\_\_ - \_\_\_\_\_

### WHEN?

Data Direct requests five working days to complete a merge/purge. We often do it in less, but we sure won't promise it. We take great care to get the job done right and often need the time to check, redo, and recheck a process. Please enter the date you need this merge/purge completed. Then, enter the "cutoff" date five working days back (usually one calendar week) when all materials and instructions need to be in our office:

Ship Date: \_\_\_\_/\_\_\_\_/\_\_\_\_ ✍ Cutoff Date (5 working days previous): \_\_\_\_/\_\_\_\_/\_\_\_\_

**LIST OF LISTS**

Unless you are providing a separate “list of lists”, please list all input lists that are to be included in the merge. Do not list any suppress (eliminator) lists here, but do include any “house” lists that are to be included. Also enter the keycode(s) and the quantity of records (approximates OK) for each list. If known, list the source of each list, such as your list broker or list provider.

If you have a priority ranking, please list in that order. If you require splits and rekeys, please provide separate instructions.

#	List	Keycode	Quantity	Source
1	_____	_____	_____	_____
2	_____	_____	_____	_____
3	_____	_____	_____	_____
4	_____	_____	_____	_____
5	_____	_____	_____	_____
6	_____	_____	_____	_____
7	_____	_____	_____	_____
8	_____	_____	_____	_____
9	_____	_____	_____	_____

We can purge duplicates randomly or according to the priority ranking above such that duplicates are purged from the bottom lists first. Please circle your preference:

random purge

priority purge

**SUPPRESS LISTS**

Please list any suppress lists (eliminators or no-mail file) below. Once again, please indicate the expected quantity and source for each.

List	Quantity	Source
_____	_____	_____

**MOVE-UPDATE**

Data Direct can update the addresses in your mailing list through the use of NCOA (National Change of Address) or *FASTforward* services. These services are offered at additional charges and will add some processing time. Please circle

NONE    NCOA (2-day)    NCOA (4-day)    *FASTforward* (1-day)    *FASTforward* (3-day)

*DMA PURGE*

Data Direct subscribes to the DMA Preference file and we can use it as a suppression list. This file contains over 4 million people who have asked not to receive direct mail. Would you like us to use the DMA file as a suppression list against your mailing? There will be a nominal \$100 charge for this additional processing.

NO

ON ALL LISTS

ON RENTED LISTS ONLY

*COMPETITOR / COMPANY PURGE*

Business mailers often have a list of competitors or other companies that they wish eliminated from a mailing. Will such a special purge be required?

yes (please provide a separate list)

no

*HOUSEHOLD/COMPANY PURGING*

Please select your desired level of purging.

\_\_\_\_\_ Individual: Only one record survives the purge for each individual. Husbands and wives are not considered duplicates at this level.

\_\_\_\_\_ Business-2-Business: Business-to-Business: An individual level purge that accounts for the same individual potentially having different addresses at the same business.

\_\_\_\_\_ Household/Company: Only one record survives the purge for each household or company.

\_\_\_\_\_ Family: Only one record survives the purge for each household or company for each last name. This is the most appropriate level when only one surviving record per family is desired.

\_\_\_\_\_ Other: Please specify. \_\_\_\_\_

*SEED NAMES*

“Seed” names should be added to a mailing to track the timeliness and received condition/quality of a mail piece. Note that we add seed names after all purging is completed; hence, adding a seed that is already in an input list will create a duplicate. Are seed names to be added to the final output list?

yes (please provide a list with complete addresses)

no

If so, what keycode (if any) is to be assigned to the seed names: \_\_\_\_\_

## CHARACTER CASE

Source lists are received in both UPPER and Mixed case. We can convert all lists to either case as you request. In most cases, our Mixed Case conversion for Company acronyms like IBM and AMD will be converted correctly, however there may be some acronyms that will not be correctly identified. State abbreviations (e.g. CA, NY) are always converted to UPPER case. Please mark the method of case conversion preferred:

- No conversion, leave source lists as is
- Convert all to UPPER case
- Convert all to Mixed case
- Convert company name to UPPER, Mixed case for the rest
- Leave company name as-is, Mixed case for the rest

## MULTI-BUYERS

Duplicates that are purged within and between lists (other than a suppress list) are considered multi-buyers. Usually, these duplicate names can be used in a future mailing. Data Direct will, at your direction: return these records to you on diskette, or discard them. Please circle your option:

Return to you on diskette

Discard

## OUTPUT SPECIFICATIONS

Data Direct's standard is to filter out records that either do not CASS certify and/or have a first or a last name. If you wish to include these records in the final output, please specify which selections you wish to include.

- YES! Include all records that do not CASS certify
- YES! Include all records even if they do not have FIRST or LAST name

Data Direct can output the final list in many forms. Additionally, the output can be sorted in ZIP code order or postal presorted for optimized postage cost. Please mark which output format(s) is/are required:

- printed labels
- standard magnetic tape
- diskette or CD ~~ⓧ~~ circle system:    PC            Mac
- e-mail \_\_\_\_\_
- other \_\_\_\_\_

