Guide

DataMatch Enterprise™
User Guide

About DME

DataMatch Enterprise™ solution is a highly visual data cleansing application specifically designed to resolve customer and contact data quality issues. The platform leverages multiple proprietary and standard algorithms to identify phonetic, fuzzy, miskeyed, abbreviated, and domain-specific variations. Build scalable configurations for deduplication & record linkage, suppression, enhancement, extraction, and standardization of business and customer data and create a Single Source of Truth to maximize the impact of your data across the enterprise.

Features

✓ **Quick Profile:** Highlight potential data quality issues like non-printable characters, missing data, mixed numbers, and letters, etc.
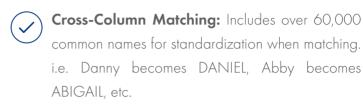
✓ **Data Survivorship:** Define a single 'master' record by choosing which duplicate survives and the field you want to merge on while capturing additional data in a separate field.

✓ **Data Deduplication:** Merge the most complete information across duplicates, overwrite data from a master to other duplicates, and delete duplicates from your data sets.

✓ **Data Integration:** Integrate virtually any data source across the enterprise (databases, CRMs, social media, file formats, email, Big Data repositories, etc.)

✓ **Workflow Orchestration:** Schedule your projects to run once, on a recurring basis, on a defined schedule, or when an imported file is updated.

✓ **Instant Data Preview:** See how your data changes with your data cleansing methods in real-time and create the best configuration.

✓ **Cross-Column Matching:** Match data across columns – useful when data entry errors put data in the wrong column.

✓ **Standardization Libraries:** Built-in libraries for nicknames (Jon=Jonathan), postal codes, street suffixes, state and city, and a best-in-class library creator for your custom needs.

✓ **Pattern Matching:** Use Regex wizard to quickly identify patterns and extract into new fields. Example: Text "3 x 4 x 6" can be extracted into: Length = 3, Width = 4, and Height = 6.

✓ **In-Memory processing:** Process millions of records without physically importing data with our highly scalable, in-memory architecture and export only when you are satisfied.

✓ **Phone Number Cleansing:** Automatically cleans telephone numbers to improve matching capability. Useful when matching international numbers.

✓ **Bulk Standardization:** Identify and count unique words and values in your lists and so you can replace, delete, or extract values into new fields.

Quick Profile: Set a match threshold (0-100%) and view your matches/duplicates – match on multiple fields/columns and see the match percentage on each field/column.

Cross-Column Matching: Includes over 60,000 common names for standardization when matching. i.e. Danny becomes DANIEL, Abby becomes ABIGAIL, etc.

Match Scorings: Set a match threshold (0-100%) and view your matches/duplicates – match on multiple fields/columns and see the match percentage on each field/column.

Email Address Cleansing: Advanced email address cleaning feature finds errors and automatically suggests corrections.

Step 1

Below you will fin the instruction to install DataMatch Enterprise™ 3X version.

If you have installed a version prior to 3.1.2.0, it is important that you uninstall it from your computer.

⚠ **IMPORTANT:** This process will not affect the projects you have already saved.

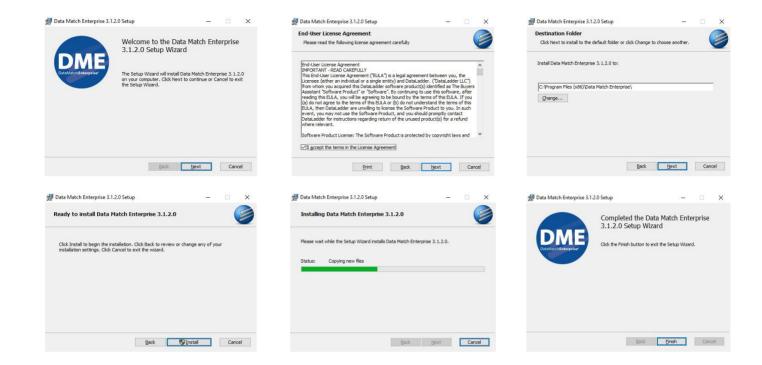📧 DataMatchAddressVerificationEnterpriseGeo February...

Step 2

Download and install the latest DME 3X version by clicking on the button below
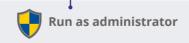
Free Download

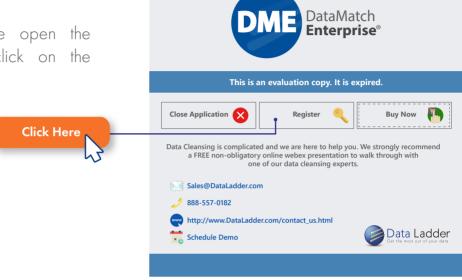# Registering Your Software

① It is recommended that you run the program as administrator during the registration process (Right click program icon and select 'Run as Administrator').

🛡️ **Run as administrator**

![Data Ladder logo - Get the most out of your data]

2

To register the software open the application and then click on the registration button.

Welcome to

DME DataMatch **Enterprise**®

This is an evaluation copy. It is expired.

| Close Application ❌ | Register 🔑 | Buy Now 👆 |

Data Cleansing is complicated and we are here to help you. We strongly recommend a FREE non-obligatory online webex presentation to walk through with one of our data cleansing experts.

✉ Sales@DataLadder.com

📞 888-557-0182

www http://www.DataLadder.com/contact_us.html

📅 Schedule Demo

Data Ladder
Get the most out of your data

Click Here

🔍 **Registration**

Step 1: Copy the signature to the clipboard

PC Signature: **Your PC Signature**   Copy to Clipboard

Step 2: Get a registration key

Order product on: **http://www.DataLadder.com** and email your pc signature to **suppor@DataLadder.com**

Step 3: Ensure the registration info received by email is copied into the clipboard

Registration name: **Your Registration Name**

Expiration date:

☐ Demo Extension   🔑 Paste Registration Info From Clipboard

☐ Unlimited Demo

3

Once you have clicked on the registration button, click on "Copy to Clipboard" and then reply to us with your PC Signature and your chosen registration name to **sales@dataladder.com**

4

You will receive a registration key and a registration name.

DataLadderLicenseKeyTransferLog.txt - Notepad   — ☐ ✕

File   Edit   Format   View   Help

Product Type: DataMatch Enterprise
PC Signature: A123-B445-C6D7-EF89-GH10-1JK1
Registration Name: DataMatch Enterprise Test
Additional features: Regular
License expires: Nov 29 2018

1wBXAAQAAQAAAAEARR0ARDE4Ni04RUU2LUI0RDItREMxNC02RTA3LTU4RTIWAGxiYXJyZXJhQGRhdGF
sZGRlci5jb20IAABYckfIVdYIAQAxAQAwBQAwMDAwMJ0Xl+GXZwwf9zWlPr0eOCi41v6BTsaCEz0Gx+7BN
9czKa5VMdO6bJhW7au6qSzOe3oypTjGnMgJDu8hr5d3Y8+HL1tGfmOjhPYJKHcWMppYVcb9kRxhWs4lR
GJTYPKajG+6GMdb6jfzVv8FPhLRQ6+zLkDk+7O1QoAaTVs4Zgni

Paste Registration Info From Clipboard

5 Once you receive the registration key and the name, then copy the key (all in green text) and click on the button "Paste registration info from clipboard".

If your key is approved, a window will pop up with the following **"Registration Complete - Thank You!"**

If your key is not approved, a red exclamation will appear next to the register key. This is when you should contact **support@dataladder.com** if this occurs.

6 If you are looking to schedule a training session, please provide us with some dates and times that would work for you. If there are any other questions meanwhile, please contact us.

Click Here

Welcome to DataMatch Enterprise

Our new icons will help you to get from the beginning to the end of your project

A brand new, modern, and user-friendly interface designed for the end user

Project Management	**Data Import**	**Data Profile**	**Address Verification**
Data Cleansing & Standardization	**Match Configuration**	**Match Definitions**	**Match Results**
Merge & Survivorship	**Final Export**	**Scheduler**	

Project Management and Data Import

Project Management		You can add new projects or work with existing projects

Projects

Create New Project	Open Existing Project	Remove Project	Refresh List	Project Version History	

Project	Last Modified	Created
	=	=
DataMatch Enterprise	1/9/2019 3:50:09 PM	1/9/2019 3:50:09 PM
Address Verification - Canadian Project	1/9/2019 1:10:13 PM	1/9/2019 1:10:13 PM
Deduplication Project	1/5/2019 2:50:15 PM	1/5/2019 2:50:15 PM
Data Matching and Merging Project	1/5/2019 11:10:13 AM	1/5/2019 11:10:13 AM
Data Ladder Services Project	1/5/2019 09:15:05 AM	1/5/2019 09:15:05 AM
Data Governance Project	1/5/2019 07:34:08 AM	1/5/2019 07:34:08 AM
Data Preparation Project	1/4/2019 5:00:01 PM	1/4/2019 5:00:01 PM
Record Linkage Project	1/4/2019 2:15:08 PM	1/4/2019 2:15:08 PM
OFAC Project	1/4/2019 10:22:09 AM	1/4/2019 10:22:09 AM
CRM Data Cleansing Project	1/4/2019 8:10:13 AM	1/4/2019 8:10:13 AM
Merge Purge Project	12/20/2018 3:50:09 PM	12/20/2018 3:50:09 PM
Data Migration Cleansing Project	12/20/2018 1:10:13 PM	12/20/2018 1:10:13 PM
Database Cleansing Project	11/15/2018 3:50:09 PM	11/15/2018 3:50:09 PM
Data Scrubbing Project	11/15/2018 8:00:13 PM	11/15/2018 8:00:13 PM
Identity Resolution Project	11/8/2018 3:50:09 PM	11/8/2018 3:50:09 PM
Address Data Cleansing Project	08/15/2018 8:20:10 PM	08/15/2018 8:20:10 PM
Fuzzy Matching Project	08/15/2018 4:20:10 PM	08/15/2018 4:20:10 PM
Data Matching Project	08/15/2018 4:20:10 PM	08/15/2018 4:20:10 PM
Data Deduplication and Cleansing Project	05/15/2018 3:20:10 PM	05/15/2018 3:20:10 PM
Services 2 Project	05/15/2018 9:20:12 AM	05/15/2018 9:20:12 AM
Data Deduplication and Cleansing Project	05/15/2018 7:22:11 AM	05/15/2018 7:22:11 AM

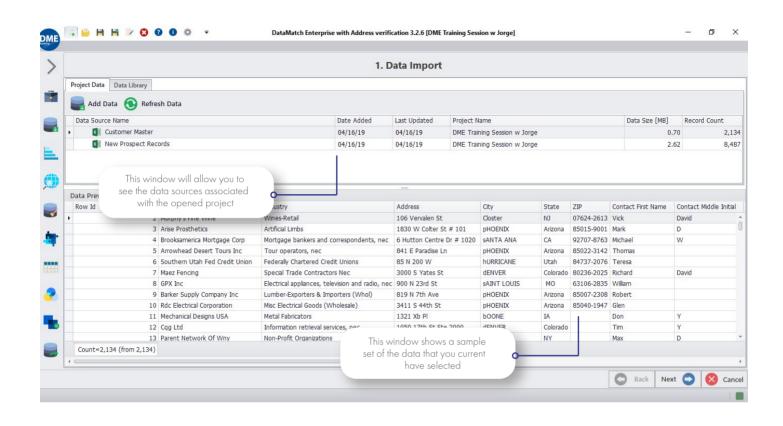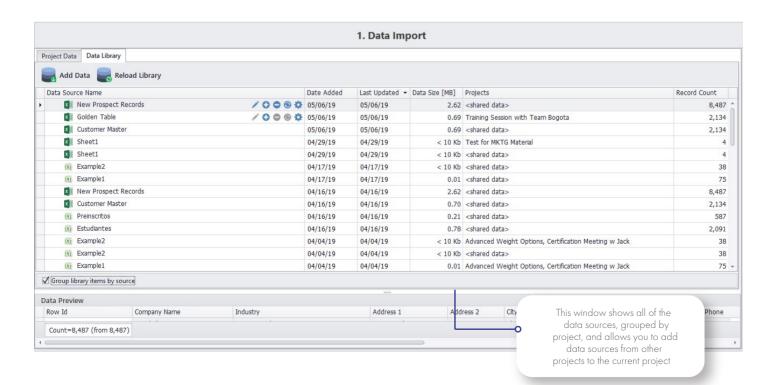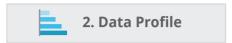|		
1. Data Import		This option will show you all the available data sources. You can work with up to 10 tables per projects.

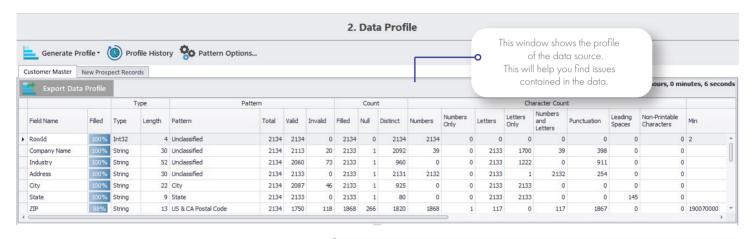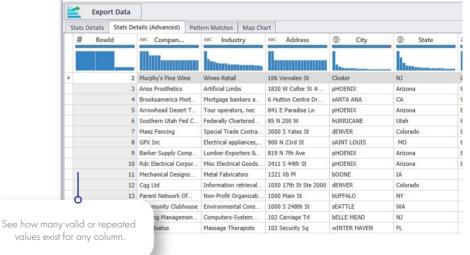**All Sources**

![Data Ladder logo]

DataMatch Enterprise with Address verification 3.2.6 [DME Training Session w Jorge]

1. Data Import

Project Data | Data Library

Add Data | Refresh Data

Data Source Name	Date Added	Last Updated	Project Name	Data Size [MB]	Record Count
Customer Master	04/16/19	04/16/19	DME Training Session w Jorge	0.70	2,134
New Prospect Records	04/16/19	04/16/19	DME Training Session w Jorge	2.62	8,487

> This window will allow you to see the data sources associated with the opened project

Data Preview

Row Id		Industry	Address	City	State	ZIP	Contact First Name	Contact Middle Initial
2	Murphy's Fine Wine	Wines-Retail	106 Vervalen St	Closter	NJ	07624-2613	Vick	David
3	Arise Prosthetics	Artificial Limbs	1830 W Colter St # 101	pHOENIX	Arizona	85015-9001	Mark	D
4	Brooksamerica Mortgage Corp	Mortgage bankers and correspondents, nec	6 Hutton Centre Dr # 1020	sANTA ANA	CA	92707-8763	Michael	W
5	Arrowhead Desert Tours Inc	Tour operators, nec	841 E Paradise Ln	pHOENIX	Arizona	85022-3142	Thomas	
6	Southern Utah Fed Credit Union	Federally Chartered Credit Unions	85 N 200 W	hURRICANE	Utah	84737-2076	Teresa	
7	Maez Fencing	Special Trade Contractors Nec	3000 S Yates St	dENVER	Colorado	80236-2025	Richard	David
8	GPX Inc	Electrical appliances, television and radio, nec	900 N 23rd St	sAINT LOUIS	MO	63106-2835	William	
9	Barker Supply Company Inc	Lumber-Exporters & Importers (Whol)	819 N 7th Ave	pHOENIX	Arizona	85007-2308	Robert	
10	Rdc Electrical Corporation	Misc Electrical Goods (Wholesale)	3411 S 44th St	pHOENIX	Arizona	85040-1947	Glen	
11	Mechanical Designs USA	Metal Fabricators	1321 Xb Pl	bOONE	IA		Don	Y
12	Cqg Ltd	Information retrieval services, nec	1050 17th St Ste 2000	dENVER	Colorado		Tim	Y
13	Parent Network Of Wny	Non-Profit Organizations			NY		Max	D

> This window shows a sample set of the data that you current have selected

Count=2,134 (from 2,134)

Back | Next | Cancel

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1. Data Import

Project Data | **Data Library**

Add Data | Reload Library

Data Source Name		Date Added	Last Updated ▼	Data Size [MB]	Projects	Record Count
New Prospect Records	✏ ⊕ ⊖ ⊗ ⚙	05/06/19	05/06/19	2.62	<shared data>	8,487
Golden Table	✏ ⊕ ⊖ ⊗ ⚙	05/06/19	05/06/19	0.69	Training Session with Team Bogota	2,134
Customer Master		05/06/19	05/06/19	0.69	<shared data>	2,134
Sheet1		04/29/19	04/29/19	< 10 Kb	Test for MKTG Material	4
Sheet1		04/29/19	04/29/19	< 10 Kb	<shared data>	4
Example2		04/17/19	04/17/19	< 10 Kb	<shared data>	38
Example1		04/17/19	04/17/19	0.01	<shared data>	75
New Prospect Records		04/16/19	04/16/19	2.62	<shared data>	8,487
Customer Master		04/16/19	04/16/19	0.70	<shared data>	2,134
Preinscritos		04/16/19	04/16/19	0.21	<shared data>	587
Estudiantes		04/16/19	04/16/19	0.78	<shared data>	2,091
Example2		04/04/19	04/04/19	< 10 Kb	Advanced Weight Options, Certification Meeting w Jack	38
Example2		04/04/19	04/04/19	< 10 Kb	<shared data>	38
Example1		04/04/19	04/04/19	0.01	Advanced Weight Options, Certification Meeting w Jack	75

☑ Group library items by source

Data Preview

Row Id	Company Name	Industry	Address 1	Address 2	City		Phone

> This window shows all of the data sources, grouped by project, and allows you to add data sources from other projects to the current project

Count=8,487 (from 8,487)

Data Profile: Data Understanding

2. Data Profile

This window shows the profile of the data source. This will help you find issues contained in the data.

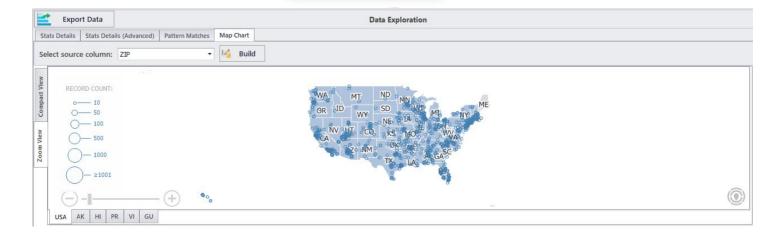In the phase of the data profiling we will detect the following:

1. Amount of leading spaces
2. Non-printable characters
3. Fields with mixed numbers and Letters
4. Distinctive characters
5. Field population level (Field Population Percentages)
6. Types of fields within the system
7. Variations of characters within the fields (Fields and their various variations eg If a field is numeric and contains letters, letters O instead of Zeros and symbols (! "# $%,. / * - ())
8. Variations within fields: Profiling of possible variations within the fields physical addresses and emails.

See how many valid or repeated values exist for any column.

Address Verification: USA & Canada

3. Address Verification

Check the validity and deliverability of a physical mailing address with our updated data quality technology.
DataMatch Enterprise™ Server Edition comes equipped with address validation and geocoding technology, which helps standardize your address lists for mailings. Standardization converts an address to a standard format by correcting the address and adding missing information (such as a zip code or a suffix). It is then compared against a list of valid addresses to determine validity. You also have the ability to enhance each matching address and add ZIP+4 level latitude and longitude values for the best in mapping precision.

DataMatch Enterprise™ Address Verification Software can handle a multitude of tasks:

• Import files from over 270+ different formats
• Nationally CASS Certified™ - Process your data at speeds up to millions of records per hour.
• PostalOne! MAIL.DAT - Submit data electronically to the USPS for postal acceptance and payment purposes.
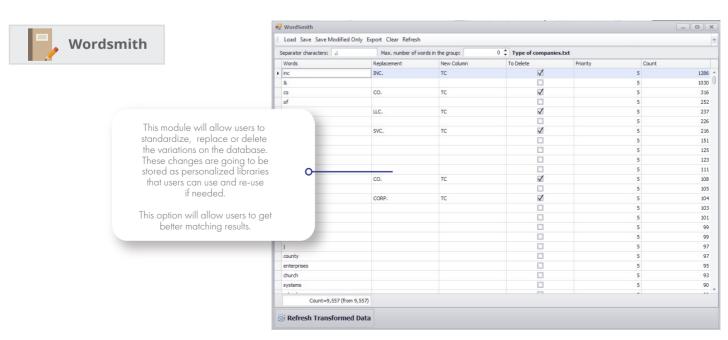• Canadian address verification

Data Cleansing and Standardization

4. Data Cleansing & Standardization

This module will allow you to cleanse, standardize, parse, transform and/or merge your data
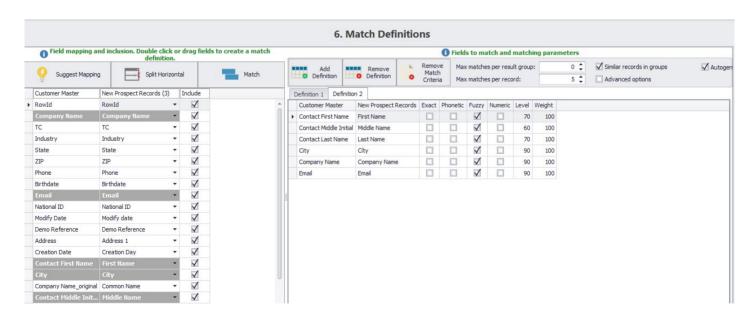

letters with numbers.
and replace zeros with O's.

Upper, Lower, Reverse or Proper casing scenarios

Remove Leading and trailing spaces, nonprintable characters & characters you don't need.
For example: !"#$%&/()=,.*-/

The Pattern Builder,
based on regular expressions (RegEx),
is a feature that will allow
users to build and search
for patterns within a column
and parse the match
found into a new column.

Rules take place real time in a dynamic view

Wordsmith

This module will allow users to standardize, replace or delete the variations on the database. These changes are going to be stored as personalized libraries that users can use and re-use if needed.

This option will allow users to get better matching results.

Match Configuration and Definition

5. Match Configuration   This module will allow you to define the type of matching that you want to conduct.

Only compares matches within each data source

Clears any selections made

Only compares matches between the data sources

All of the data sources will be matched to each other and within themselves.

6. Match Definitions   This module will allow you to develop one or more match definitions and begin the matching process.

You can think of Match Criteria and Match Definitions in terms of AND/OR SQL statements. The relationship between match definitions would be an AND statement and the relationship between the match criteria would be an OR statement.

All Records In Group Must Be Similar - This is an important option and if you are unsure, we recommend that you maintain this box checked. We offer the following example as an explanation of this option:

1. You have 3 records: A, B, and C
2. A is similar to B, B is similar to C and C is NOT similar to A
3. If you check this option, then the match results will yield 2 groups
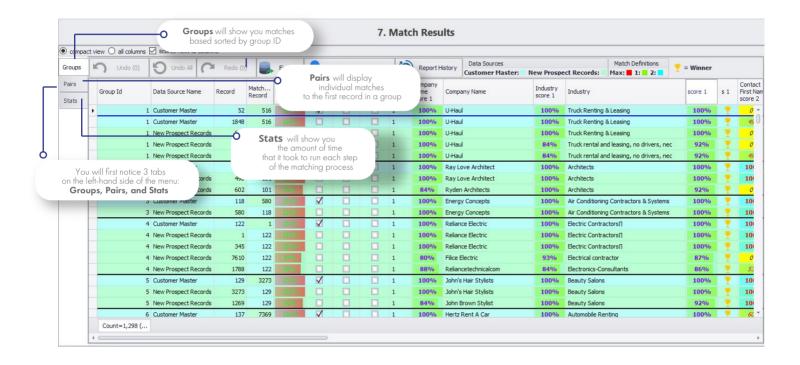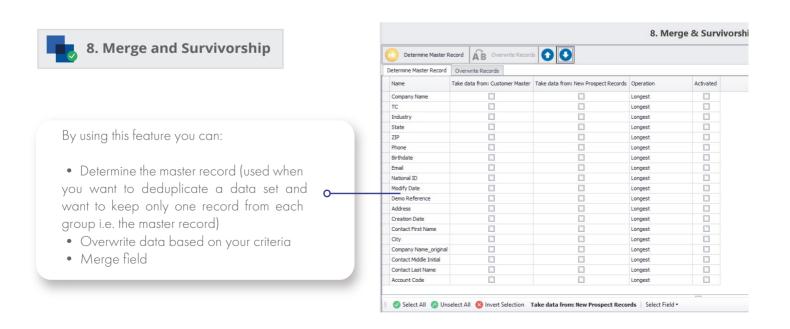4. If you uncheck this option, then the match results will yield 1 group

Match Results

7. Match Results

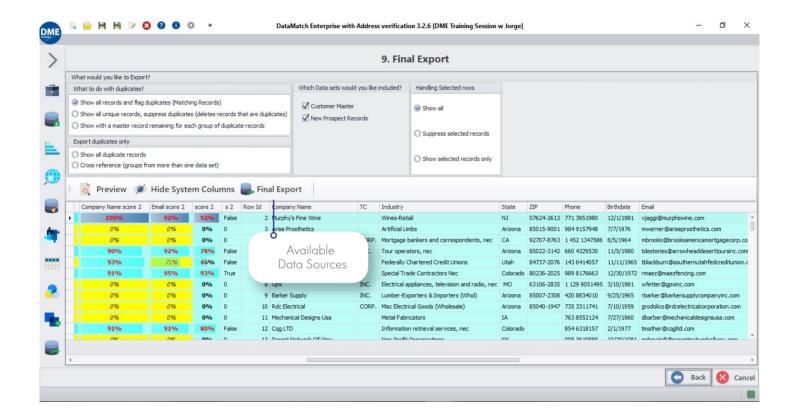This module will allow you to anazlyze the match results and view a match Summary Report.

Groups will show you matches based sorted by group ID

Pairs will display individual matches to the first record in a group

Stats will show you the amount of time that it took to run each step of the matching process

You will first notice 3 tabs on the left-hand side of the menu: **Groups, Pairs, and Stats**

8. Merge and Survivorship

By using this feature you can:

• Determine the master record (used when you want to deduplicate a data set and want to keep only one record from each group i.e. the master record)
• Overwrite data based on your criteria
• Merge field

Final Export

9. Final Export

This module will allow you to view and create a final export to a desired format

ABOUT US

Data Ladder is a data quality software company dedicated to helping business users get the most out of their data through data matching, profiling, deduplication, and enrichment tools. Whether it's matching millions of records through our fuzzy matching algorithms, or transforming complex product data through semantic technology, Data Ladder's data quality tools provide a superior level of service unmatched in the industry.

Why Data Ladder

It's simple: our user-friendly and powerful software helps business users across many industries manage their data more effectively and drive their bottom line. Our powerful software suite, DataMatch Enterprise, was proven to find approximately 5-12% more matches than leading software companies IBM and SAS in 15 different studies.

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