

2008

Quick Start Guide

Personator

The indispensable tool for personalized mailings



MELISSA DATA

Personator

Quick Start Guide

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Welcome to Personator!

Personator is a one-stop solution for personalizing your mailing list by:

- Splitting full names into first, middle and last names, plus prefixes and suffixes.
- Resolving double and mixed-format names.
- Genderizing records based on first names.
- Building customized salutations for business letters.
- Processing up to 100 million records per hour.

System Requirements

Personator requires:

- Microsoft® Windows NT, 2000, 2003, XP or Vista.
- Intel Pentium III® or better.
- 128 MB RAM.
- 10 MB of available hard disk space.

Installation

To install from a CD:

1. Insert the installation disk into your CD-ROM drive.
2. The installation program should start automatically and the install program will appear.
3. Follow the on-screen instructions.

If installation does not start automatically:

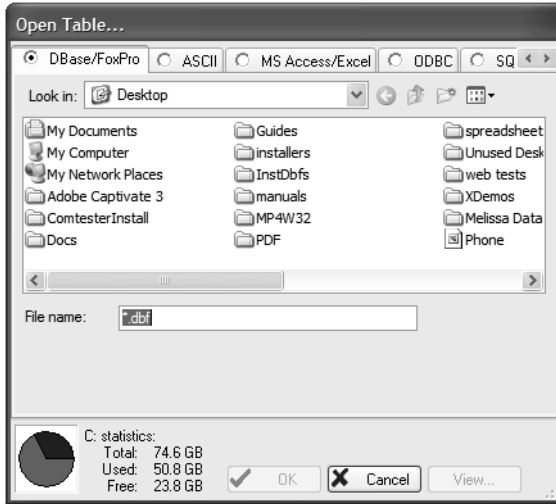
1. Click the **Start** button on the task bar.
2. Click **Run...**
3. Type **d:\setup.exe** (where d: is your CD-ROM drive letter).
4. Follow the on-screen instructions.

Open a Table

Before you can create a new setup, you must first open the database table that you will be processing.



1. Click the **Open Table** button.
2. Personator displays the Open Table dialog.



3. Select the tab for the type of database being used (dBase/Foxpro, ASCII, MS Access/Excel, ODBC, SQL, Oracle or DB/2).
 - a. For dBase/FoxPro and ASCII files, select the file to be opened and click **OK**.
 - b. For MS Access and Excel files, select the file to be opened and the table to use, then click **OK**.
 - c. For ODBC databases, select the type of database to be used, then select the database and table to use. Click **OK**.
 - d. For SQL, DB/2 and Oracle databases, follow the directions on the tab.

The drivers to use SQL, Oracle and DB/2 databases are installed with Personator, but if you do not have the clients for those databases installed, you may use the ODBC driver to connect with them. This is slower but will work.

If you open a file and there is already a Personator setup with the same root name in the same folder, Personator will ask if you want to open that setup. Click **OK** to use the existing setup.

New Setup

A Setup is a collection of settings that instructs Personator how to process the data in your database table.



1. To begin creating a new setup, click the New Setup button.
2. Personator displays the **Setup** dialog and the **Field List**.

The Setup dialog has four tabs: Name Splitter, Genderizer, Salutation Maker and Address Splitter. Each of these can be enabled and configured independently of the others.

The Field List contains a list of all the columns currently in the open table or file. Fields being used by the current setup are shown in green. To use an existing field in a setup, you can drag a field name over one of the dropdown lists and drop it.

Name Splitter

The Name Splitter does exactly what the name suggests, taking a string containing one or two full names, such as “John H. Smith” or “Ms. Mary and Mr. Bill Jones,” and splitting them into prefix, first name, middle name, last name and suffix. If there are two names, it can write them back to a second set of name fields in the same record or to a new duplicate record (identical except for the name data).

The screenshot shows the 'Name Splitter' tab of the Personator Setup dialog. The 'Name Splitter' checkbox is checked. The 'Input' section has 'Name' set to 'FULLNAME'. Under 'Mainly Contains', 'Full Names' is selected. Under 'Also Contains', 'Full Names' is also selected. In the 'Double Name Options' section, 'Two Names per Field' is checked, and 'Handle 2nd name how?' is set to 'Create duplicate record'. The 'Remove 2nd name from Input Name field' checkbox is also checked. The 'Output Name 1' section has fields for Prefix (PREFIX, size 10), First (FIRST, size 20), Middle (MIDDLE, size 20), Last (LAST, size 20), and Suffix (SUFFIX, size 10). The 'Output Name 2' section has corresponding fields: Prefix2 (PREFIX2, size 10), First Name (FIRST2, size 20), Middle Name (MIDDLE2, size 20), Last Name (LAST2, size 20), Suffix (SUFFIX2, size 10), and Full Name (FULL2, size 30). In the 'Splitter Options' section, 'Put "." before the Suffix' is unchecked, 'Split by' is set to 'Logic', and 'Error Code' is set to 'ERROR'.

To enable the Name Splitter, check the **Name Splitter** box at the top.

Input

Using the **Name** dropdown list, select the field containing the name to be split. Use the two sets of buttons (“Mainly Contains” and “Also Contains”) to the right of the list to describe how the names in the field are formatted.

- **Full Names** — The field contains some or all of the name parts in the following order: prefix, first name, middle name, last name and suffix.
- **Inverse Names** — The field contains some or all of the name parts in the following order: last name, suffix, prefix, first name and middle name.
- **Government Inverse Names** — The field contains some or all of the name parts in a different order than Inverse names: last name, prefix, first name, middle name and suffix.
- **Mixed First Names** — The field contains only first names, possibly mixed with prefixes, leading initials (such as “J. Edgar”) and middle names or initials.
- **Mixed Last Names** — The field contains only last names, possibly including suffixes.

You can select a mixture of Full Names and Inverse Names, but this can slow down processing and may result in errors from ambiguous names, like “John Wayne” (since Wayne is also a common first name).

Double Name Options

If the full name field contains two names, these options control how Personator handles this situation.

To enable checking for double names, check the “Two Names per Field” box.

Select how Personator will handle double names from the dropdown list.

- **Move to another field** — Personator activates the second Full Name dropdown list. Select a field and Personator will write the full name of the second person to that field. If you are working with dBase files, you can enter a new field name in the box and Personator will create the field during processing. If you do this, you will need to manually set the length of the field using the box to the right of the field name.
- **Split It** — This instructs Personator to parse the second name and activates the second set of name part fields. These are handled exactly like the first set, which are described below.
- **Create duplicate record (dBase files only)** — Personator copies the data to a new record, substituting the name parts from the second name in place of the name parts from the first.
- **Ignore it** — Personator acts as if there were only one name in the field. If the input field contained “John and Mary Smith,” Personator would ignore Mary.

Checking the **Remove 2nd Name from Input Name** field box instructs Personator to remove any trace of the second name from input field during processing.

Output Names

These options control which fields will contain the parsed name parts after processing.

1. Select a field name from each of the **Prefix**, **First Name**, **Middle Name**, **Last Name** and **Suffix** dropdown lists.
2. If Double Name splitting is enabled, select a second set of field names from the dropdown lists on the right.

If you are working with dBase files, you can enter a new field name in the box and Personator will create the field during processing. If you do this, you will need to manually set the length of the field using the box to the right of the field name.

If you select the same field for more than one name part, Personator will combine the parts into a single string before writing it back to the database. This way, you can combine prefixes, first names and middle names or last names and suffixes.

Splitter Options

1. If you check Put “,” before the suffix, Personator will do one of the following:
 - If the suffix has its own output field, Personator will insert a comma and space as the first two characters of the field.
 - If the last name and suffix are being combined, Personator will insert a comma before the space between them.
2. If your full name is separated by a delimiter character, such as a comma, select **Delimited** from the options under **Split By** and enter the delimiter character in the box to the right. Otherwise, leave the **Logic** option selected.
3. If you want Personator to store any error code in the database, select a field from the dropdown list. If you are working with dBase files, you can enter a new field name in the box and Personator will create the field during processing.

Refer to page 120 of the manual for a list of error codes.

Genderizer

The Genderizer attempts to detect the gender of a person named in the record by comparing their first name to a database of common first names. You can control how aggressively Personator attempts to apply this logic to your data.

You can also select how Personator writes the gender information back to the database. The most common is to attach the prefix “Mr.” to male names and “Ms.” to female names, but you can also choose to write gender codes back to a different field instead.

To enable the Genderizer, check the **Genderizer** button.

Input

These options control where Personator gets the information it will use to genderize the name.

1. Select a field that contains the first name from the dropdown list. This can be the first name field if you have already run Name Splitter or are also running it as part of the same setup. It can also be the full name if it has not yet been parsed. Personator will temporarily split the name to determine the first name before genderizing.
2. Select the option that describes the kind of information contained in the selected field. See Name Splitter section for the meanings of the various options.
3. Select a last name field from the dropdown list. This is optional, but can prevent Personator from genderizing a record that does not contain a full set of name data. Also, if the last name field contains both last names and suffixes, you can select this field if you want Personator to transform suffixes into prefixes.
4. Select a prefix field from the dropdown list. This is optional if you want Personator to transform suffixes into Prefixes.

5. Check **Transform Suffixes** if you want Personator to take suffixes like “MD” and “PHd” and create prefixes such as “Dr.” It can also transform generational suffixes such as “Jr.” and “III,” which normally indicate a male name, into the prefix “Mr.”
6. Check **Remove Transformed Suffixes** will cause Personator to delete any suffixes that have been transformed into a prefix.

Output Gender

The Output Gender determines how Personator writes the gender information back to your database. You have the option of generating prefixes based on the gender or using gender codes.

1. Using the Prefix dropdown box, select the output field that Personator will use when writing the gender information back to the database. If you are working with dBase files, you can enter a new field name in the box and Personator will create the field during processing. If you do this, you will need to manually set the length of the field using the box to the right of the field name.
2. Check “Gender Code” to use one-letter codes rather than prefixes.

Code	Gender
M	Male
F	Female
N	Neutral

3. Select the **Contains** option that best describes the type of data contained in the output field. If you select anything other than “Only Prefixes,” Personator will append the prefix before the first name. This option is not available if “Gender Code” has been checked.
4. Check **Override existing Prefixes** to replace any prefixes already in your output field with those created by the genderizer.
5. If you selected the “Full Names,” “Inverse Names,” or “Government Inverse Names,” you can also check **Put “,” before Prefix**.
6. If you selected prefixes rather than gender codes, you can enter the male, female and neutral prefixes for Personator to use in the text boxes provided. Personator defaults to “Mr.” and “Ms.” with no prefix for neutral names.

Genderizer Options

These options allow you to control how aggressively Personator applies its gender-checking logic to the database and select whether the list represents a predominantly male, female or mixed population.

1. Select the **Precision** option that best suits your needs. The “Aggressive” option will be more likely to select male or female if an ambiguous first name tends

toward a particular gender. The “Conservative” option will be more likely to select neutral unless a name is clearly male or female.

2. Select the **Population** option that best describes the gender balance of the people listed in your database, if you know that the population is either predominantly male or female. This option combines with the Precision to control how Personator handles names that are not 100% male or female. For example, if the “Aggressive” and “Male” options were both selected, Personator would classify completely neutral names, such as “Lee” or “Chris,” as male.
3. Select the Table option to select which database Personator will use when genderizing. The larger Genderbase option is more accurate but processing will be slower.
4. If you want Personator to store any error code in the database, select a field from the dropdown list. If you are working with dBase files, you can enter a new field name in the box and Personator will create the field during processing.

Refer to page 120 of the manual for a list of error codes.

Salutation Maker

The Salutation Maker constructs a personalized salutation from the name parts contained in your data.

The screenshot shows the Salutation Maker interface with the following sections:

- Navigation:** Name Splitter, Genderizer, **Salutation Maker** (checked), Address Splitter
- Salutation Maker:** (checked)
 - Input:** Prefix: PRE1, First Name: FN1, Last Name: LN1, Suffix: SUF1
 - Contains:** Only Prefix, Mixed First, Full Names, Inverse Names, Gov't Inverse Names, Only Last Names, Mixed Last
 - Output Salutation:** Salutation: SALUTE, Size: 30, Error Code: ERROR
 - Salutation Options:** Create Formal Salutation ("Dear Mr. Smith:"), Create Informal Salutation ("Dear John:"), Create FN-LN Salutation ("Dear John Smith:"), Use Neutral Slug ("Dear Customer:"), Leave Blank
 - Householding:** (unchecked), Count: <None>, Household records with counts over: 0
- Additional Options:** Override existing Salutations, Salutation Prefix: Dear, Salutation Terminator: , Salutation Slug: Dear Customer., Salutation Prefix: Dear, Salutation Terminator: Family.

< Click and drag these options to arrange these formats from most desirable (top) to least (bottom).

Input

1. Using the **Prefix** and **First Name** dropdown lists, select the fields that contain the prefix and first name information. Use the **Contains** options to the right of the Prefix list to indicate what kind of information is found in the selected Prefix field.

If the option is anything other than “Only Prefixes,” you will probably select the same field for both prefix and first name.
2. Use the **Last Name** and **Suffix** dropdown lists, select the fields that contain the last name and suffix information. Use the **Contains** options to the right of the last Name list to indicate what kind of information is found in the selected Last Name field.

If the option is “Mixed Last Names,” you will probably select the same field for both last name and suffix.

Output Salutation

1. Select a field name that Personator will use to store the generated salutation. If you are working with dBase files, you can enter a new field name in the box and Personator will create the field during processing. If you do this, you will need to manually set the length of the field using the box to the right of the field name.
2. If you want Personator to replace existing salutations, check **Override existing Salutation**.
3. Enter a prefix for your salutations if you do not want to use the default (“Dear”).
4. Enter a suffix for your salutations if you do not want to use the default (“:”).
5. Enter a salutation slug, which Personator will use if a record does not have enough information to generate a salutation, if you do not want to use the default (“Dear Customer:”).
6. If you want Personator to store any error code in the database, select a field from the dropdown list. If you are working with dBase files, you can enter a new field name in the box and Personator will create the field during processing.

Refer to page 120 of the manual for a list of error codes.

Salutation Options

Personator lets you change the order of preference that the Salutation Maker uses to select a format to use when generating a salutation. Personator will attempt to generate a salutation using the selected order until it finds a format that it has enough information to use.

The options are:

- Formal (“Dear Mr. Smith:”)

- Informal (“Dear John:”)
- First Name, Last Name (“Dear John Smith:”)
- Neutral Slug (“Dear Customer:”)
- Leave blank (Do not generate a salutation)

The last option, whatever it is, will never be used because at least one above it will always succeed.

To change the order of the format options, simply click on an option and drag it to a new position.

Householding

If you also use a de-duping product like Melissa Data’s MatchUp, you can generate a count of how many records in your mailing lists come from the same address.

The householding feature can generate a special salutation directed collectively to everyone at the address.

1. Select the field that contains the count generated by MatchUp or a similar product. Without the count, you cannot use householding.
2. Set the maximum count for which Personator will not use householding.
3. Enter a salutation prefix if you do not wish to use the default (“Dear”) while householding.
4. Enter a salutation terminator if you do not wish to use the default (“Family:”).

If you use the default settings, Personator will generate a household salutation such as “Dear Jones Family:” for every address with a count greater than one.

Address Splitter

Much like the Name Splitter does to names, Address Splitter breaks down address data into its parts, such as house number, street name, directionals, city, state and ZIP Code. It will also standardize the abbreviation and formatting of street addresses.

Input

Personator handles up to three lines of address data, although one is required.

1. From the **Address Line 1** dropdown list Select the field that contains the first line of address data.
2. Repeat for **Address Line 2** and **Address Line 3**, if necessary.
3. If your database has the city, state and ZIP Code information in a single field, select that field from the **City/State/Zip** dropdown list.
4. Select the option that best describes the **Country of Origin** for the data in this database, "US Only," "Canada Only" or "US & Canada."

Output

Use the dropdown lists in this section to specify which fields Personator will use to write the address data back to the database.

The fields in the left column will contain the standardized versions of the address data found in the input fields, plus the split data from the **City/State/Zip** field.

The fields in the right column will contain the parts from street address.

If you are working with dBase files, you can enter a new field name in the box and Personator will create the field during processing. If you do this, you will need to manually set the length of the field using the box to the right of the field name.

Splitter Options

If you want Personator to store any error code in the database, select a field from the dropdown list. If you are working with dBase files, you can enter a new field name in the box and Personator will create the field during processing.

Refer to page 120 of the manual for a list of error codes.

Options Set

Use this dropdown box to select which settings to use with Address Splitter.

- **Default** — These settings should work under most circumstances.
- **USPS** — These settings reflect the best practices according to the USPS.
- **Optimal CASS** — These settings will work best with a CASS Certified address checking software like MAILERS+4 or MatchUp.
- **Custom** — Select this and then click **Custom Options...** to select the exact options that you wish to use.

Custom Options

These options control how Personator abbreviates and formats the various address parts. Check the ones that best suit your needs.

- **Abbreviate Pre-Directionals** — Converts “12 North Main St” to “12 N Main St.”
- **Abbreviate Post-Directionals** — Converts “12 Main Street North” to “12 Main Street N.”
- **Abbreviate Suffixes** — Converts “12 Main Street” to “12 Main St.”
- **Expand Suffixes appearing in Name** — Converts “123 Ave Q” to “123 Avenue Q.”

- **Abbreviate or Expand Numerics Appearing in Name** — “Abbreviate Numerics” converts “Sixteenth St” to “16th St.”
“Expand Numerics” converts “16th St” to “Sixteenth St.”
- **Standardize Number** — Converts “12 1/2 Main St” to “12.5 Main St.”
- **Standardize PO Box** — Converts “POB 123” to “PO Box 123.”
- **Standardize Secondary** — Converts “Apartment” to “Apt,” “Suite” to “Ste” and “Room” to “Rm.” “1st Floor” or “Floor 1” are converted to “FL 1.”
- **Convert Hyphenated Number into Secondary** — Converts “12-3 Main St” to “12 Main St Apt 3.”
- **Remove Street Address if PO Box is present** — Converts “123 Main St PO Box 456” to “PO Box 456.”

Saving the Setup

1. Click **OK** to finish creating the new setup.
2. You will be warned if some of the input fields may be truncated. Click **Yes** to confirm.
3. Click the **Save Setup** button.
4. Specify a directory and a file name for the new setup and click **OK**.

Processing

To process the data in the currently loaded setup, simply click the **Process** button.



Personator will display the Processing Options dialog.

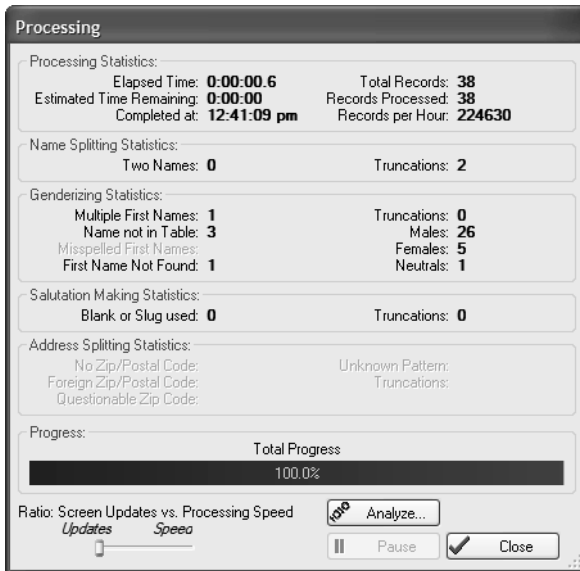
The screenshot shows the "Processing Options" dialog box with the following settings:

- Operations:**
 - Split Names (with "Check All" button)
 - Genderize (with "Check None" button)
 - Create Salutations
 - Split Addresses
 - End in ASCII
- Records:**
 - All Records in the Table.
 - Records meeting these conditions:
 - Record Range: From: 1 To: 0
 - For (Expression):
 - While (Expression):

Buttons at the bottom: OK, Cancel, Help

By default, the Operations (Name Splitter, Genderizer, Salutation Maker and Address Splitter) that are enabled in the current Setup will be checked. If an operation was not enabled in the Setup, that check box will not be enabled.

To begin processing, click **OK**. Personator displays the **Processing** dialog.



The **Processing** dialog shows continually updated statistics about the operation in progress, including the number of records already processed, the total records, the current speed in records per hour, and the estimated time when the current operation will be completed.

The Processing dialog has a small slider bar near the bottom, with “Updates” at one end and “Speed” at the other. When the slider bar is moved toward the “Updates” end, the dialog will be updated more frequently. Move the slider toward “Speed” and Personator will dedicate more cycles to processing the list rather than updating the screen, meaning that the number will change less frequently. While this theoretically does speed up the processing, it tends to make the program less responsive to user input. If you click the **Cancel** or **Pause** button, it will take longer for Personator to respond. Current computers are fast enough that this setting probably does not have a noticeable effect on overall speed, but if you are using Personator on an older computer, this control may improve performance.

After processing is complete, the **Processing** dialog will show the final statistics and enable the **Analyze...** button.

Analyze

After processing is complete, click the **Analyze...** button on the Processing dialog or the **Analyze** button on the main tool. Personator displays a list of the records in the recently processed table. Records with any kind of error are highlighted. There are also separate dialogs for each operation enabled in the current Setup (Name Splitter, Genderizer, Salutation Maker and Address Splitter), list the contents of the relevant fields.



To locate the first record with an error, click the **Locate Next Error** button. This moves the cursor to the first record with any kind of an error code. The relevant contents of the record are also shown in the separate dialogs, along with the identity of the error or errors found. Name Splitter errors are displayed on the Name Splitter dialog, Genderizer errors on the Genderizer dialog, and so on.

At this point, examine the record and determine the severity of the error.

- If the record with the error is still usable, click the **Clr/Nxt Error** button. This removes the error code from the record and moves the cursor the next record with an error.
- If the record is not usable in its current form, it may be possible to salvage the record by editing the contents of one or more fields in one of the separate dialogs. Simply modify the contents in the text boxes and click the green check in the lower right corner of the dialog being used to modify the record.
- If the record is not usable and cannot be made usable, click the **Toggle Delete** button. This marks the record for deletion the next time the database is packed (dBase files only).

Packing the Database (dBase Files Only)

To pack the database and remove records marked for deletion in dBase tables:

1. Close the **Analyze** window.
2. Click the **Browse** button. Personator opens the Browse window.
3. Click the **File Control** menu and select **Pack Table**.
4. Confirm that you want to permanently delete the marked records, click **Yes**.

