

Using GoldBox's Merge-Purge Primer Table

The purpose of the Primer Table is to allow you to

- a) Review the records that GoldBox has selected for Merge-Purging; and
- b) Influence what will happen when a Merge-Purge is run in **Batch Mode** (i.e., "for keeps").

I find that the Primer Table gives me a great combination of **control** (like you'd find with a Manual Merge-Purge); and **speed** (because you are looking at a summary of what is to happen, but still will be using Batch Mode, which is by far the fastest way to do a Merge-Purge).

As I'll explain, you can use the Primer Table to drop individual Contact records from the Merge-Purge process (protecting them); even to drop out **all** the records in a **DupeID Group** (protecting all the records in that Group). You can also pick a different record than the default to be the **Survivor record** within a Dupe ID Group. And, because the Primer Table displays the Notes length for each record within each Dupe ID Group, you can use the Primer Table to spot Dupe ID Groups that have more than one record containing Notes in Contact1. This enables you, if you want, to manually copy and paste Notes from the records that will be deleted to the Survivor record before the Merge is done. All Notes will be copied to History records from each Deleted Contact record anyway; but this gives you the opportunity to merge the Notes from different Contact records exactly the way you want to see them.

The Primer Table is created when a Merge-Purge is run in **Count Mode**¹, with the **Primer Table option checked**. Once that "dry run" has been completed, the Primer Table can be accessed as shown below:



The screenshot shows the DUPRIMER software window. The title bar reads "DUPRIMER by (NO TAG) Duplicates of most recent Merge-Purge COUNT Mode". The window has a toolbar with various icons and a "GxBrowser Options" dropdown menu. Below the toolbar, it says "DDE Active", "Row 1 of 22", "Flagged: 0", and "Search:". The main area contains a table with the following columns: Dupe ID, Survivor, Company, Contact, and Main Email.


Dupe ID	Survivor	Company	Contact	Main Email
0000001	✓	Alfred Gordon Photography	Alfred Gordon	agphotog@aol.com
0000001		ALFRED GORDON PHOTOGRAPHY	ALFRED GORDON	
.....2	✓	Anita White Carson Middle School	Alicia Kirkpatrick	
.....2		Anita White Carson Middle School	Alicia Kirkpatrick	kirkpatrick@greene.k12.ga.us
0000003	✓	AMY KNOLLMEYER PHOTOGRAPHY	AMY KNOLLMEYER	
0000003		AMY KNOLLMEYER PHOTOGRAPHY	AMY KNOLLMEYER	
.....4	✓	Appalachian State University	Amy Steelman	
.....4		Appalachian State University	Amy Steelman	2541937@app.state.edu
0000005	✓	American Foil, Inc	Armin Ismail	amfoil@hotmail.com
0000005		American Foil, Inc	Armin Ismail	armin@americanfoil.com
.....6	✓	Arthur's Photography	Arthur Jones	
.....6		Arthur's Photography	Arthur Jones	arthursfoto@aol.com
0000007	✓	ART SUNDQUIST PHOTOGRAPHY	ART SUNDQUIST	
0000007		ART SUNDQUIST PHOTOGRAPHY	ART SUNDQUIST	

¹ Always, always, **ALWAYS** run GoldBox's **Contact Verifier** for Contact1 and Contact2 before running a Merge-Purge in any Mode. Then, perform whatever actions are necessary to get the results in all four columns for Contact1 and Contact2 all zero, before doing the Merge-Purge. Also, always, always, **ALWAYS** backup your entire database before starting to do a Merge-Purge.

The **numbered** groups in column **Dupe ID** each represent a set of “found” dupes. On the previous page, two records per group are shown, but there could be more in any Dupe ID Group. The data shown is extracted from GoldMine; although it’s possible to edit the entries, you’ll accomplish nothing by doing so. If you want to be able to edit data that you see; or just want to see more data than the Primer Table contains; simply **have GoldMine open when you open the Primer Table**. That way, when you click on an entry in the table, **that Contact will be brought forward in GoldMine**, and you can make your edit directly in GoldMine.

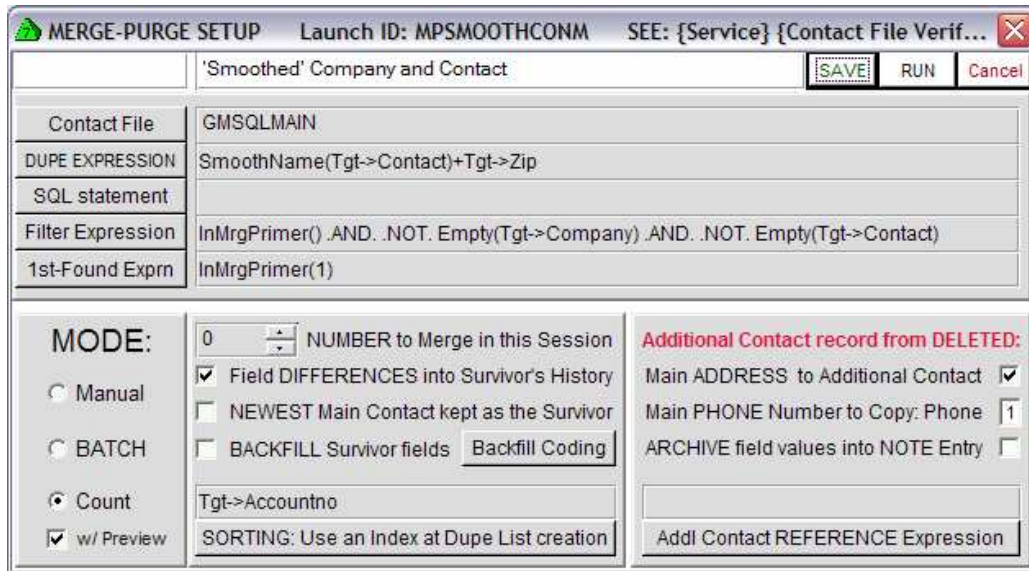
There are only 2 types of edits you’ll ever make in the Primer Table:

1. Normally, all the records within a **Dupe ID** group will be merged into the Survivor record (except the first, which **IS** the Survivor record). However, **you can “rescue” any of the records within the Dupe ID group from being merged out of existence by DELETING the record from the Primer Table**. This is a sort of “double negative” situation; if you delete a record from the Primer Table, it drops out of the Merge-Purge Process, so you are deleting it from the list of records to be deleted, which actually saves it from deletion. Naturally, if you delete all the records in a Dupe ID group from the Primer Table, the entire Dupe ID group will drop out of the Merge-Purge, and nothing will happen to any of the records. As a rule, **if you have only 2 records within a Dupe Group; and they are not for the same person; delete BOTH of them**.

To delete a record from the Primer Table, just press the  button on the toolbar of the Table. If you change your mind about deleting a record, press the button again, and the deletion will be reversed.

2. This type of edit will probably be rare. Normally, the **first Contact record listed within a Dupe ID group will always be the Survivor record**, after the Merge-Purge has been run in Batch Mode. However, **you can change that by placing a checkmark in the column Saved, for the one record that you want to be the survivor record. IMPORTANT: NEVER, EVER PLACE MORE THAN ONE CHECKMARK WITHIN ANY DUPE ID GROUP. IF YOU DO, YOU WILL DESTROY DATA!!!**

Note: the above 2 items only work because of two special functions that **must** be included in the setup of the Merge-Purge when it’s run in Batch Mode. Here’s an example:



The following **MUST** be done before changing a Merge-Purge from Count Mode to Batch Mode, if you have made changes in the Primer Table. If in doubt, always check with me or another GoldBox expert.

1. You must add the function **InMrgPrimer()** to whatever filter is already in use.
2. You must use the function **InMrgPrimer(1)** as the **1st found Exprn**. Note the addition of the parameter 1 in the second expression; it is critical that this function be used exactly as shown.

Dupe ID	Survivor	Note Size	Addl Cons	Details	Referrals	Pending	History	Groups	Link Docs	Ap Tracks	Opptys	Projects	Email Ad
0000001	✓	130	0	0	0	0	0	0	0	0	0	0	1
0000001		97	0	0	0	0	0	0	0	0	0	0	0
.....2	✓	0	0	0	0	0	0	0	0	0	0	0	0
.....2		0	0	0	0	0	0	0	0	0	0	0	0
0000003	✓	0	0	0	0	0	0	0	0	0	0	0	0
0000003		0	0	0	0	0	0	0	0	0	0	0	0
.....4	✓	0	0	0	0	0	0	0	0	0	0	0	0
.....4		0	0	0	0	0	0	0	0	0	0	0	1
0000005	✓	0	0	0	0	0	0	0	0	0	0	0	1
0000005		0	0	0	0	0	0	0	0	0	0	0	1
.....6	✓	0	0	0	0	0	0	0	0	0	0	0	0
.....6		0	0	0	0	0	0	0	0	0	0	0	1
0000007	✓	0	0	0	0	0	0	0	0	0	0	0	0
0000007		0	0	0	0	0	0	0	0	0	0	0	0

Finally, one feature of the Table is that it does contain a numeric summary of the various types of Tab records that are attached to each record, plus an indication of the length of Notes for each record.

You **MAY** decide to allow the Tab record information to influence whether or not you change which record will be the survivor. **But you would only do that because you feel that the record with the most attached records is likely to have the best address and phone information.** You do **NOT** need to worry about losing any of those attached records, no matter which record is the survivor. The survivor will end up with **ALL** the attached records, regardless.

On the other hand, there is also Notes Size (length) information, and it can prove to be very useful to you. The idea is to scan down that column of the Primer Table and stop when you find a Dupe ID Group that has more than one record with a non-zero value for Notes. Chances are, you'll want to manually combine the Notes into the Survivor record. Here's an example:

This record is the first record in the Primer Table, and is the default Survivor record of the first Dupe ID Group.

It does contain a Notes entry, which is part of a well-known sentence. Its value in the Notes column of the Primer Table is 130.

Here is the record that will be merged into the Survivor, and then deleted. It has a different Notes entry, the second half of that sentence.

Its Notes length value is 97, but what's important is that both records have Notes. Just by using Copy and Paste, we can put the Notes data from the record that will be deleted into the record that will survive, as shown on the next page.



It's entirely your decision whether you do this kind of manual Notes merging. If you don't, the Notes from all deleted records will still be carried over to the Survivor during the Batch Mode Merge-Purge; they will just be in the form of Notes in special History records that GoldBox creates. It is simply not possible for GoldBox to do the kind of merging that you could do manually.