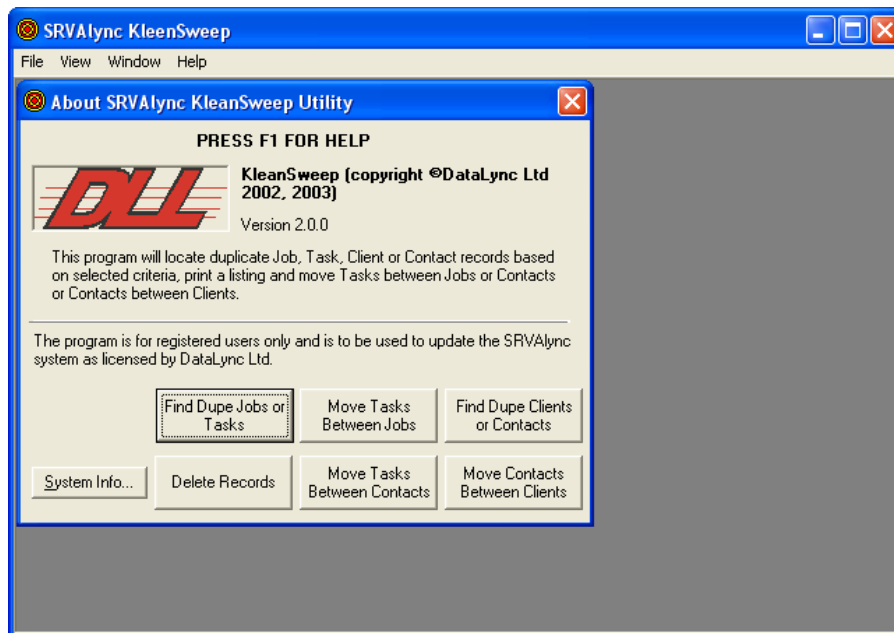


## **SRVAlync's KleenSweep® Record Management Utility** **With "Smart" Data Matching**

If duplicate or erroneous records are bugging you, here's just the tool you need: **SRVAlync's KleenSweep Record Management Utility!**



In any well-used database, duplicate records can be inadvertently entered. For example, you might have a particular client entered as "Acme National Mortgage, Co." and "Acme National Mortgage Company". This means that you have contacts and jobs split between the two clients giving you an incomplete picture of client/job activity, and, worse, an erroneous picture of your accounts receivable for that Client.

The same can be true of duplicate Job and Task entries where you might have locations entered multiple times with only minor variations in descriptions.

These duplicated records are hard to find in any database, but **SRVAlync** has a solution with our KleenSweep module.

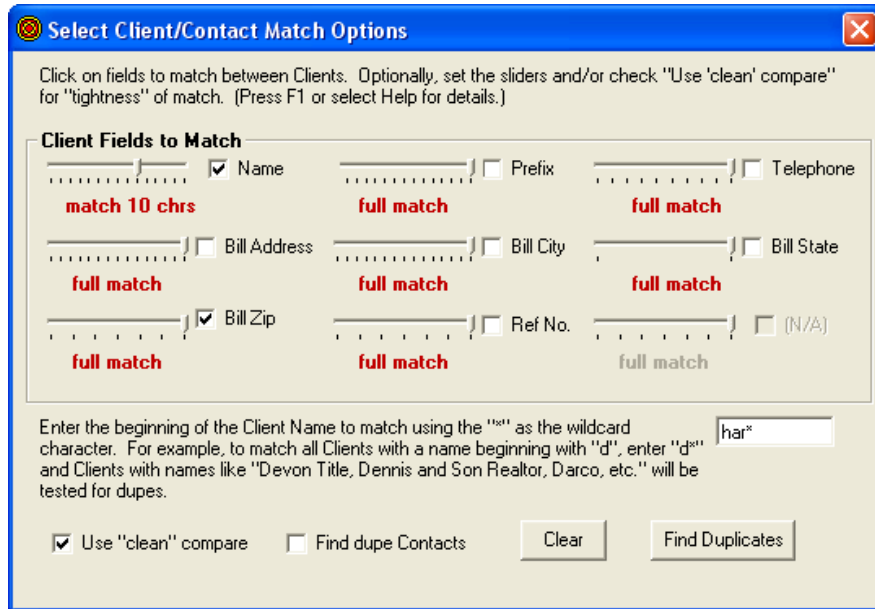
**KleenSweep** not only helps you identify duplicate Clients/Contacts and Jobs/Tasks records, but will automatically "merge" all related items from the "bad" record to the record you're retaining. All of this is done with a mouse click.

**KleenSweep** has six distinct functions:

- To locate and eliminate duplicate Job/Task entries
- To move Tasks between Contacts
- To move Contacts between Clients
- To locate and eliminate duplicate Client/Contact entries
- To move Tasks between Jobs
- To aid in deleting selected records

## How Does it Find Potentially Duplicate Records?

The utility scrutinizes each record in your database and intelligently matches those it believes are duplicates (you can even control the "looseness" with which it matches records).



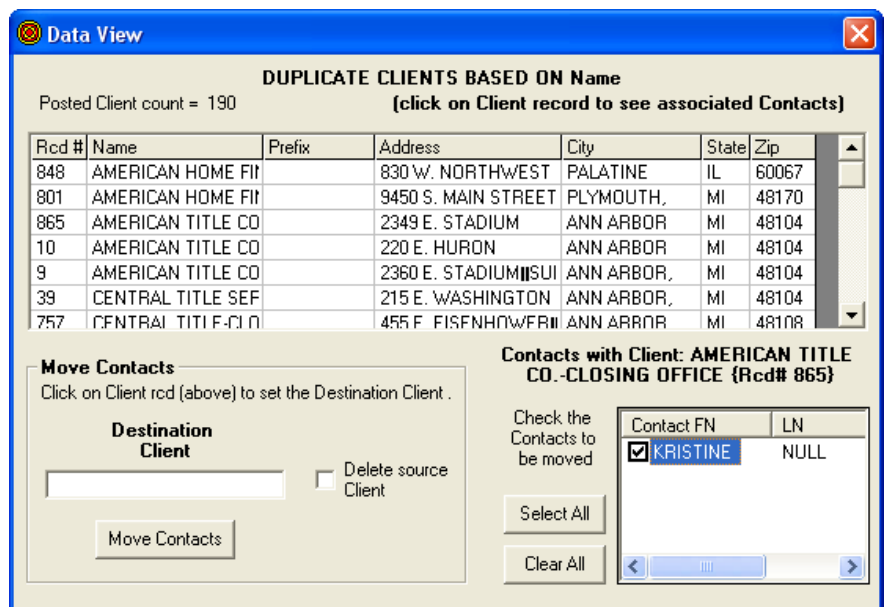
You determine how "loose" or "tight" you wish the comparison to be by setting the record's fields you wish compared along with the degree of matching. You do this using a form such as that shown at the left.

You may even limit the records being matched by entering "search criteria".

The form illustrated is for Client/Contact dupe record management

You are then presented with a list of potential duplications on the screen or in a printed report. Using your judgment, the utility offers a "point-and-click" way of correcting any duplication found while maintaining the integrity of your data.

There are several merge features such as allowing you to "transfer" all related records or only those you select. You may also have **KleenSweep** automatically delete the "duplicate" record.

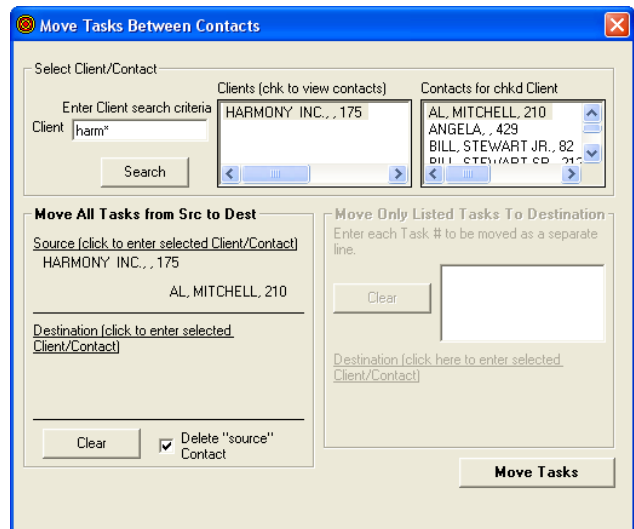
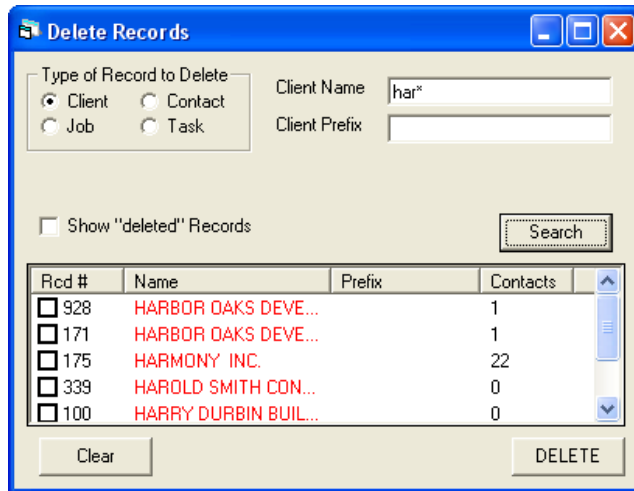


If you wish, you may print a copy of the duplicate record table for further study and reference. An example of a duplicate Clients list is shown below:

```

=====
Client Rcd #: 10 Client Name: AMERICAN TITLE COMPANY OF WASHTENAW Client Prefix:
Address: 220 E. HURON ANN ARBOR, MI 48104
---NO CONTACTS---
=====
Client Rcd #: 9 Client Name: AMERICAN TITLE COMPANY OF WASHTENAW Client Prefix:
Address: 2360 E. STADIUM SUITE 15 ANN ARBOR,, MI 48104
Contact Rcd #: 19 Contact: NULL NULL
=====
Client Rcd #: 488 Client Name: COX Client Prefix: BILL
Address: 14196 SUSANNA LIVONIA,, MI 48154
Contact Rcd #: 414 Contact: BILL COX
=====
Client Rcd #: 61 Client Name: COX Client Prefix: JIM
Address: 68925 W. EIGHT MILE RD. S. LYON,, MI 48178
Contact Rcd #: 43 Contact: JIM CARTER
Contact Rcd #: 70 Contact: JIM COX
=====
Client Rcd #: 108 Client Name: FARMERS HOME ADMINISTRATION Client Prefix:
Address: 1100 SUTTON RD. ADRIAN, MI 49221
---NO CONTACTS---
=====
Client Rcd #: 107 Client Name: FARMERS HOME ADMINISTRATION Client Prefix:
Address: 3469 GRAND RIVER HOWEL, MI 48843
---NO CONTACTS---
=====
Client Rcd #: 116 Client Name: FIREMANS FUND Client Prefix:
=====
    
```

KleenSweep also includes clean-up features for Clients, Contacts, Jobs, Tasks and Invoices with automatic "roll-up" of accounts receivable and cost data, optional duplicate Job or Client record deletion, and automatic Task and Invoice renumbering where applicable for your system.



KleenSweep comes with a complete, on-line (F1-type) help system.

## **"Smart" Data Matching**

**KleenSweep** uses a "smart" data-matching scheme. Certain data fields (e.g., street, section, Client name, etc.) may be temporarily stripped of all characters except letters, letter case and numbers for matching. This allows the utility to often spot duplicates when the same information is entered differently. For example, the utility will view "Hyde-Park Ave" and "Hyde Park Ave." or "Sec. 4" and "SEC-4" as being the same thing.

In addition, as described above, when attempting to find duplicated Client or Job records, you may choose the number of beginning characters to match for each criteria field. For example, if you think Clients may have been entered, for example, as "Harmony, Inc." and "Harmony Company", you may tell the utility to only match the first 5 or 6 characters thus assuring that it will consider the two names as potential duplicates.

## **Utility Options**

The following options are part of this utility:

- "Duplicate" Job or Client records may be automatically deleted
- The "moved" Task numbers may be automatically updated to coincide with the Job number if your numbering scheme so warrants
- The Invoice number associated with the "moved" Tasks may be automatically updated if your numbering configuration so warrants
- The Task Number field of the retained Job record may be automatically updated by the **KleenSweep**