

Mailbird Organisation Ltd

Instructions for registration and use of Mailbird CleanData

This is a step by step guide that shows you how to use the CleanData website. Mailbird Organisation Ltd offers full technical support to all its registered clients and should you find that you are having difficulties using the site, please don't hesitate to contact us on 020 8993 6116. Alternatively you can email us at data@mailbird.co.uk.

Registration:

The registration process is simple. Please follow the following procedures.

1. Go to <http://www.mailbird.co.uk> and click on the link or logo entitled 'CleanData'. This will take you to the CleanData splash page. You will see a link in the middle of the page, clearly labelled with the following text '*To register or access the Mailbird CleanData website click [here](#)*'. This will take you to the CleanData website.
2. You will be on a page entitled 'Control Centre'. To the right of this title there is a box that enables you to login to the site. Below this there is a button that says 'Register'. Click this to go to the registration page.
3. Once there, fill in all your contact details as requested. Make particularly sure your email address is valid as this is how we will correspond with you.
4. Once all your details are completed click the 'Register' button at the bottom of the screen.
5. You are now registered and will receive a confirmation email from data360@adareintellidata.com that confirms your username. *Do not reply to this email, its just for registration purposes.* Any queries should be directed to data@mailbird.co.uk.

Logging into the site:

1. Follow steps 1 and 2 as above, but login to the site with your username and password, instead of clicking the 'register' button.
2. You will now see in the top right of the screen that you are logged in.

Creating a CleanData job:

1. On the Control Centre page of the site (when you are logged in) click the button labelled 'Create'.
2. On the following screen fill in the job name and job description sections. Then, click 'Next'.

3. On the next screen you will see the words 'No Template'. If this is your first job on the CleanData site, then this will be your only option. Click 'Next'.
4. Now you can select the services you wish to use to screen your data. REMEMBER, It is completely free to screen your data. You only pay for the actual cleansing options you want after you have viewed the report.
5. Once you have selected the services you require, you can select the option to save them as a template. *Note: If you are going to be running similar jobs on a regular basis and they all require the same service, then its worth while creating the template. It just saves a bit of time. The next time you create a job, you will see the template available for use.* Should you not wish to save the services as a template then just click 'Next' once you have selected the services that you require.
6. The following screen is where you upload your data file. You can do this either by entering the file path to your file or by clicking the 'browse' button and navigation to the location of the file. **Note: Your data file needs to be in .csv format (comma separated values).**
7. If your .csv file contains field names in the first record, then tick the box below the file upload path.
8. When ready, click 'Next'. Your file will begin to upload. This may take some time depending on how large your file is.
9. When this has completed you will be informed and taken to the next screen. This will display a sample of the data you have uploaded so you check that everything is correct. When you are happy that everything is correct, click 'Next'.
10. On the following screen, CleanData will attempt to analyse your data to select the fields it needs to use to process the data. You can also manually tell CleanData which fields to use. Its as simple as dragging the relevant field from the fields available list on the left, over to the appropriate place on the right hand side.

So, if for example you had a field called 'addressee' in your data then you need to put this field into CleanData's criteria page. So you would first select the 'Single name field' check box on the right hand side and then select your 'addressee' field from the left hand side and click and drag it over to the empty box by the single name field check box.

Below is an example of how a field selection could look:

Advanced Data Management - Internet Explorer provided by Dell
 https://secure.data360.co.uk/default.asp

Search web... Advanced Data Management

Maffbird CleanData

Select Name and Address Fields

You are currently logged in
 Logout

Help Preview Cancel Back Next

Create Job
 (Step 6 of 8)

Job Description
 Select Template
 Select Services
 Upload Data
 Preview Your Data
Select Name and Address Fields
 Select Telephone Fields
 Suppression File or Submit Job

You now need to define where name and address information resides within your data. To select a field, click and drag from your input fields listed below to the appropriate name or address field on the right hand side. To deselect, click and drag back to the input field list. The preview button will allow you to view a sample of your data to check column names and data positions if you need a reminder.

Fields Available:

ID
job_title
dept
email
ms_selcode
startofbag
seq_num

Single name field:

Name:

Split name fields:

Title:

Forename1:

Forename2:

Surname:

Decorations:

Address Lines:

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

Address Line 5:

Address Line 6:

Address Line 7:

11. Click 'Next' when your selection is complete.
12. If you are doing Telephone number reformatting or TPS then on the next screen you will have a similar option as above, but obviously for telephone numbers, rather than addresses. If you have no telephone numbers in your data or do not wish to process any, simply click 'Next'.
13. You will now be asked if you have a suppression file. This is only relevant if you are deduplicating your file against another list. If you are then select 'Yes' and then follow the instructions for uploading your suppression file.
14. Clicking 'Next' will now submit your job for processing. Once your job has been submitted click 'Finish'.

Your job will now be queued for processing. Processing is usually completed from anywhere between 30min-5 hours. It really depends on how many jobs are queued in the system prior to you submitting your job. Although, you'll usually have the results within 30min.

You can view the status of your job on the website by clicking the 'Status' button anytime you are logged into the site. This will display a list of all the jobs you have submitted and the stage they are at.

Once the processing has completed, you will be notified immediately by email. The email will again come from our automated system address, data360@adareintellidata.com. It will contain the results of your submission as well as a word document containing the results file layout.

The actual results are displayed within the email in a table with a blue background. Its all clearly laid out and self explanatory. You can now make the decision as to what services you wish to purchase.

Purchasing your cleaned data:

Now that you are ready to purchase your newly cleaned file, follow the following instructions:

1. On the Control Centre screen click the 'Purchase' button.
2. Your list of submitted jobs will be displayed. Choose the job you wish and click 'Next'
3. You will now see a list of all the services that you originally chose displayed, along with the prices for these services. Tick the services that you wish to purchase and then click 'Next'.
4. You will now be taken to the payment screen. NOTE: You initially only have the option to pay by credit card. You can request to be invoiced; details are outlined below. Fill in your credit card details and submit them
5. Once payment is complete, you will be able to download your cleaned file.

Requesting to be invoiced, instead of paying by credit card:

Initially you will not be able to be invoiced for the jobs you do using CleanData. The reason for this is to prevent fraudulent use of the site. You can apply to be invoiced for jobs as detailed below.

1. Make sure you are logged into the CleanData website.
2. On the top right of the page where it tells you are logged in, click the link that says 'Customer Area'.
3. Click on the 'I don't want to pay by credit card, I want to be invoiced' link
4. Fill in the invoice application and click on the 'Apply now' button when you are done.
5. Wait for us to confirm whether or not you are eligible to be invoiced.
6. If you are eligible, you will be sent invoices by email as soon as you purchase the services you require. Terms are strictly 30days.

Help and support:

Should you require any help with the CleanData site, you can contact us on 020 8993 6116 or email us at data@mailbird.co.uk.