Instructions to produce a deduplicated mailing list

Purpose:
To generate a mailing list, it is important to combines spouses that are part of the list.
The purpose of these instructions is to demonstrate how to combine spouses that are meeting the same criteria of selection. The method only requires access to Report Studio.

Key elements of the Method:
The method is based on the generation of a household ID where one of the spouses is arbitrarily selected as head of household. A count on the household ID gives the size of the household (1 or 2 at St Thomas).
The list is then filtered to remove one of the two elements of the household.

Other applications:
A similar method can be used to group couples by household, or to select couples that share common specifications.

The Example:
The example is based on a view specifically developed for Dev Systems that summarizes the main bio information of Development Constituents.

We will generate a deduplicated mailing list of constituents that are employed by St Thomas.

The business rule for all Development mailings dictates that the male name of the household is coming in first position, the female name in second position. For the sake of this demonstration we will follow this rule to select the male record as household ID.

Instructions:
1- In ReportNet, create a list by selecting required fields.
2. Apply standard exclusions (deceased, confidential records, etc.).

3. Select St Thomas Employees. In the example, the list contains 1250 records.

4. Create the household calculated field. Select the record ID if the spouse ID is null or if the constituent is a male.
5- Create the household size calculated field. By sorting on this field we find 24 records with a household count of 2 (12 couples).

6- Filter to eliminate duplicates by selecting all records with a household count of 1 or all records where the household ID is the same as the record ID. It is good practice to apply this filter after aggregation. The final count in our example is 1238 (1250-12).