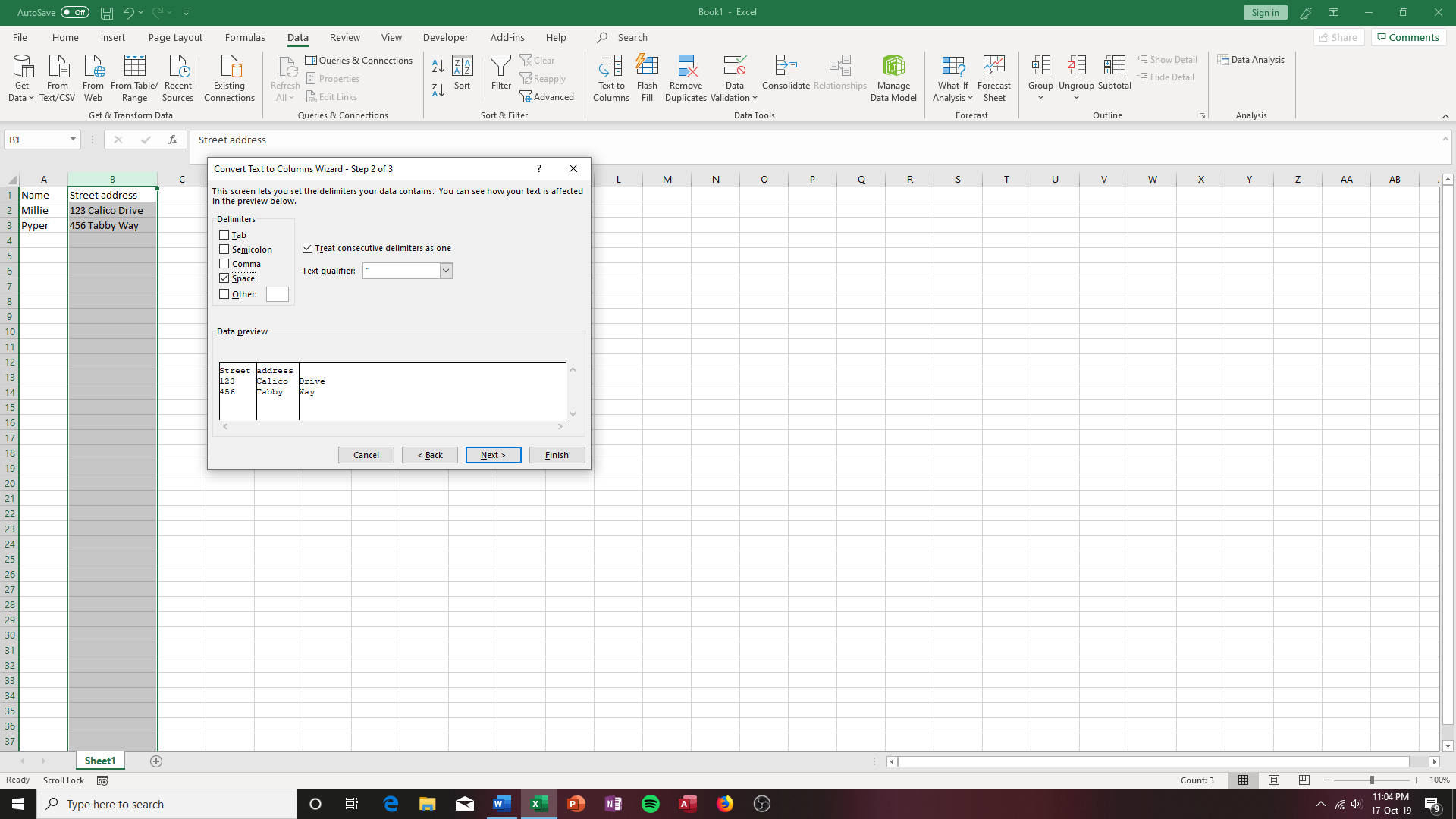
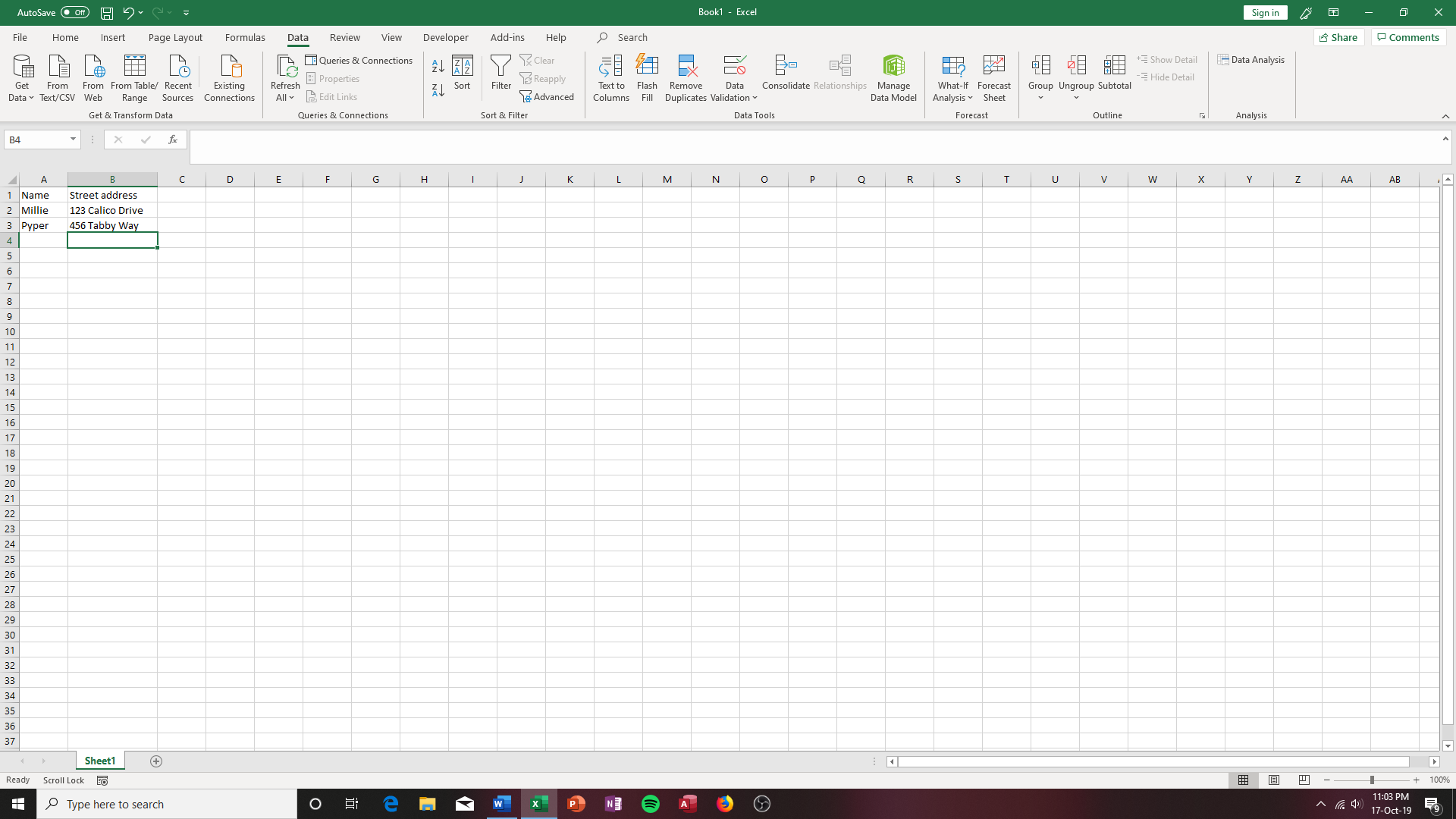
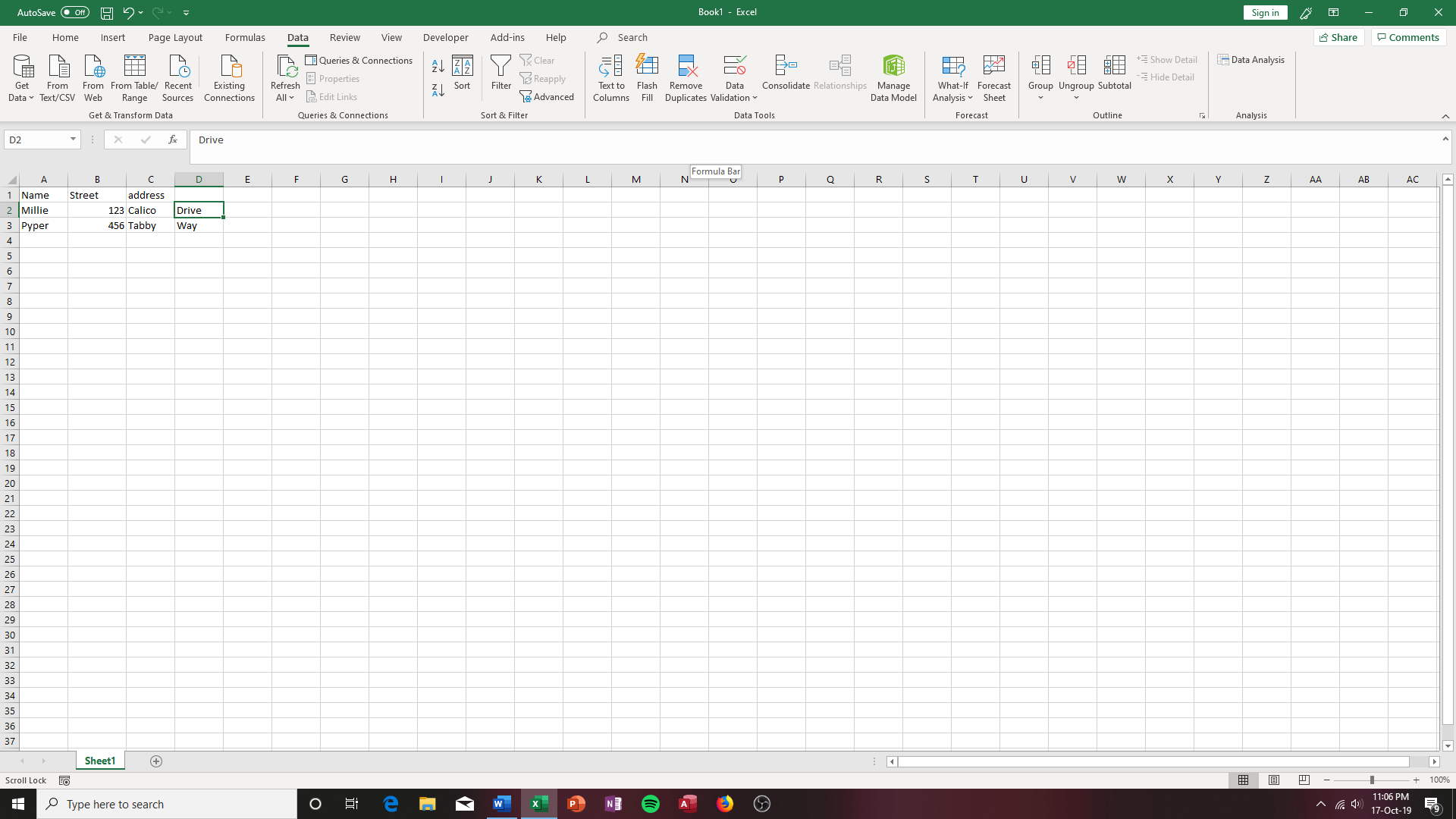
Some Excel tricks for Data Cleanup:

1. How to split up an address into constituent parts: Highlight the column with the street name and select “Text to Columns” from the Data tab.



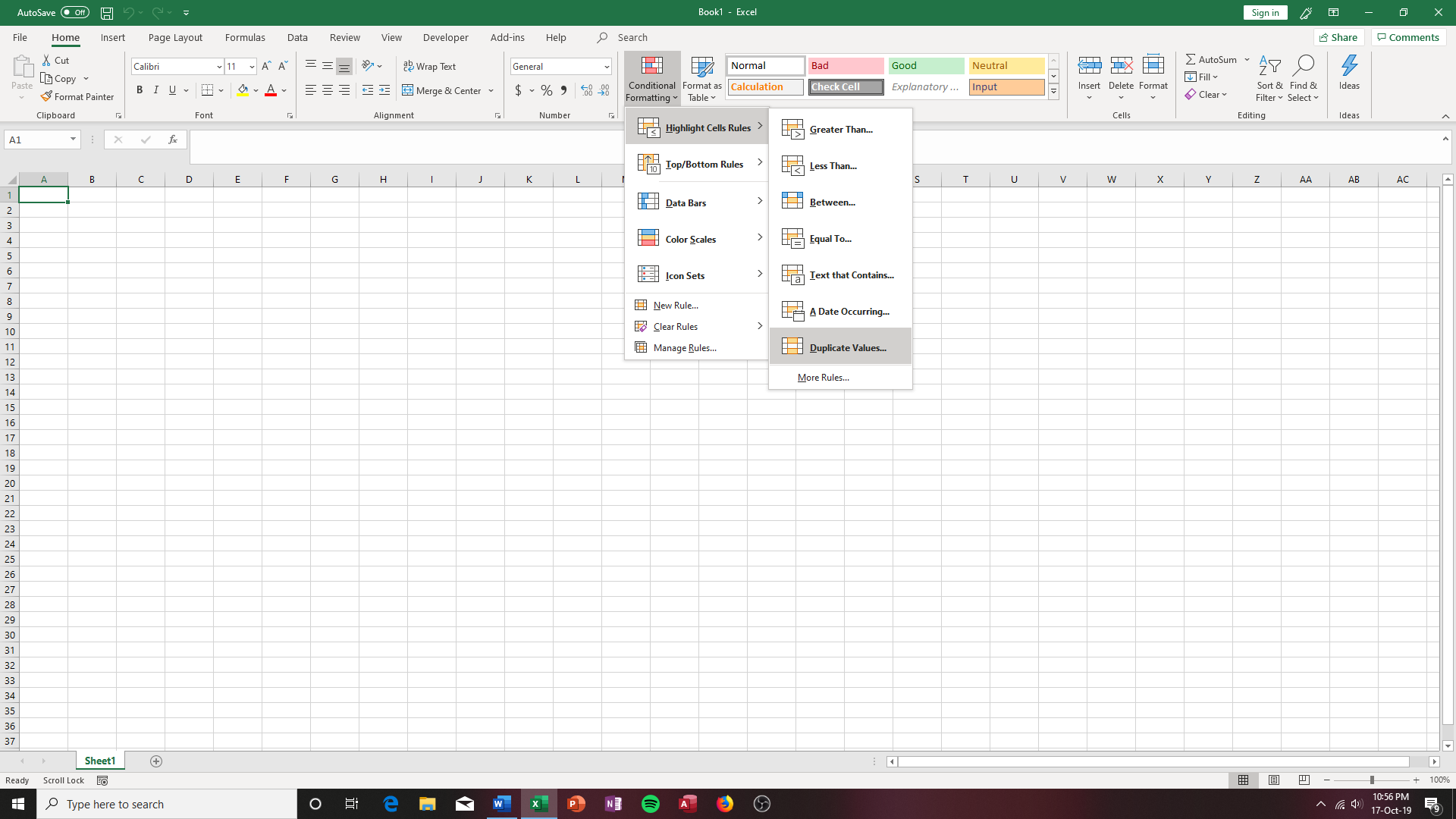
In the Text to Columns wizard that appears, choose “Delimited” on screen 1 and check only “Space” on screen 2. You can now click “Finish”.



If you sort on the column with the street name (column C here), you can identify misspellings as shown in step 2 below. You should probably sort by Column C, then D: if you have a street like St. Louis Street, “St.”, “Louis”, and “Street” will appear in their own columns.

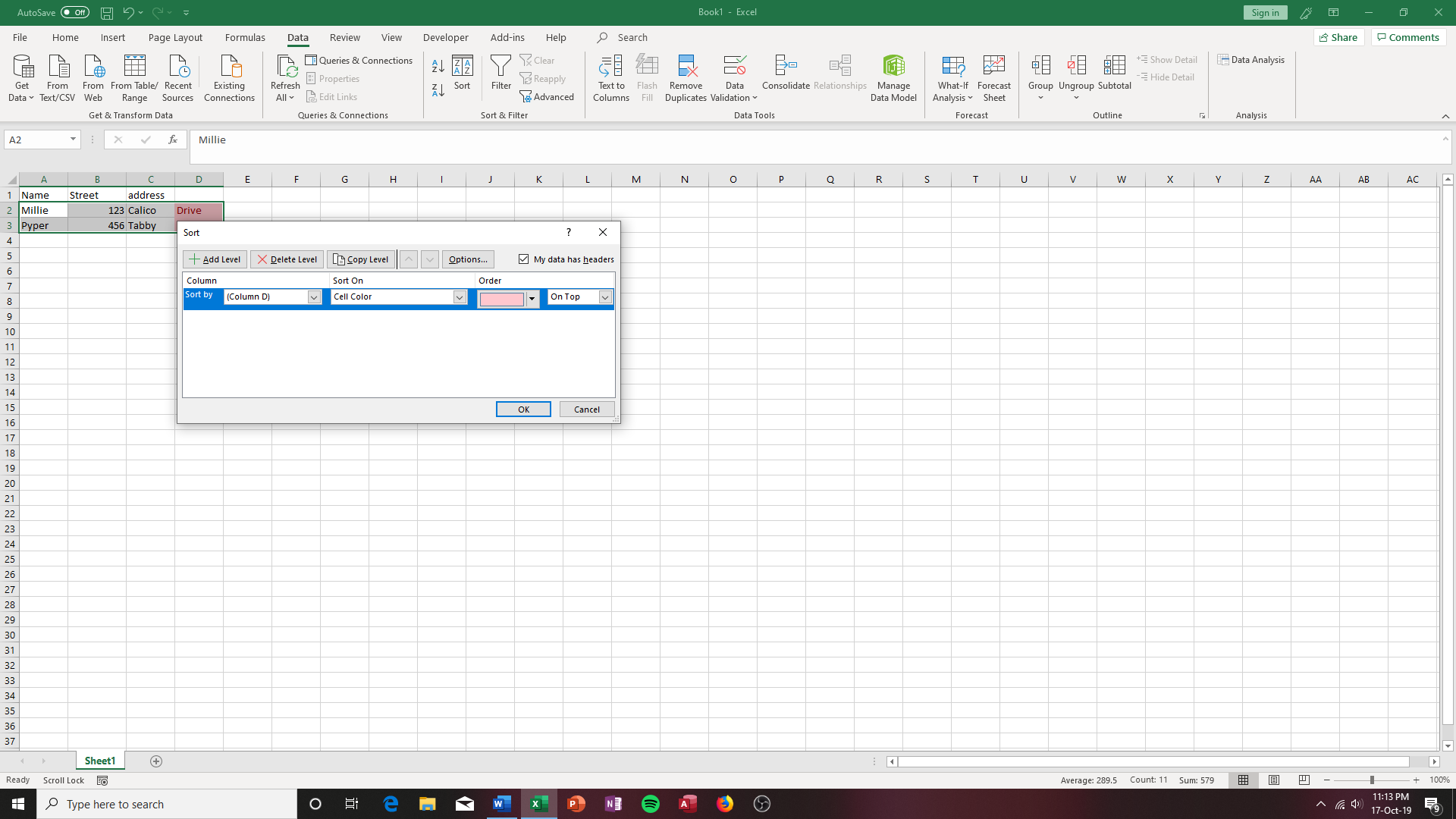
1. Identifying misspelled city or street names: Using Conditional Formatting, select the column with the city or street name and select Highlight Cells Rules -> Duplicate Values.



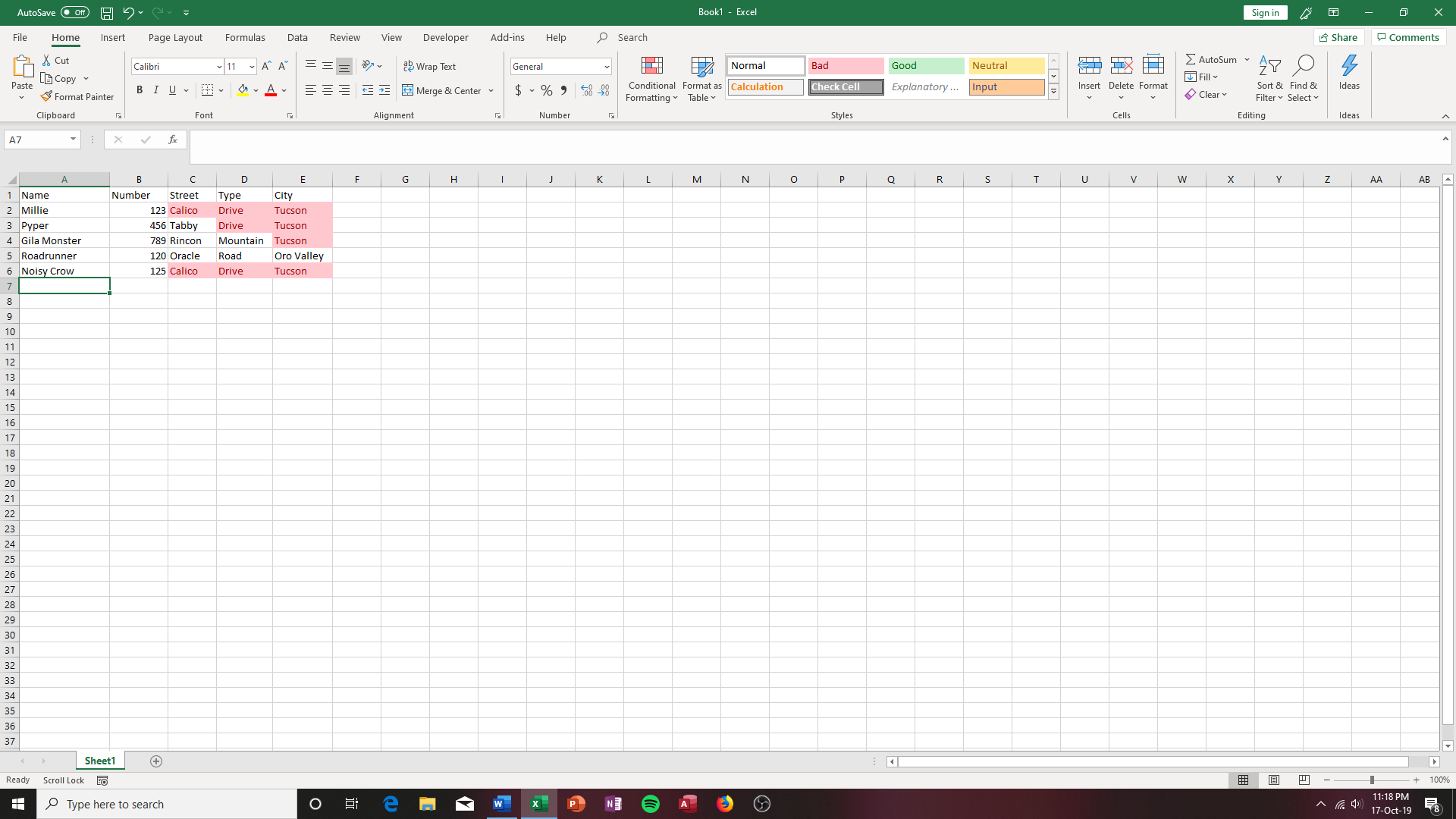
Any example of, say, “Tuscon” instead of “Tucson” will stand out as being *unhighlighted*. (If you want to just highlight uniquely misspelled values, choose “New Rule” and “Duplicate or Unique Value”, choosing “Unique” value to highlight.

Concerned that you may have the same city or street name misspelled the same way more than once? Sort your export by city or street name and look just above or below common city or street names. You’ll see them quickly.

1. You can use Conditional Formatting to identify simple duplicates in first name and last name (sort by the column with first name, then the column by last name—then do Conditional Formatting as in Step 2 above and look for highlighted names…or, sort the columns by color using the Sort feature as in the picture below:)



Maybe you’ll need a more comprehensive duplicate-finding tool. Without going too deep into the weeds using formulas, you can highlight as many duplicates in columns as you need.



Here I’ve highlighted Street, Street Type, and City. If I sorted this text by Street, then Type, then City, we would see that Millie and Noisy Crow both live on Calico Drive, Tucson. You can add as many columns as you like to identify records you think might be duplicated. This is also a good way to find out if someone has an alternate address on the same street: sometimes it’s an error in the Lexis-Nexis or other property database, but sometimes it’s because that person owns multiple properties on the street (and that happens more than you’d suspect).

1. Checking to see if you have Mr./Female or Mrs./Male constituents: A simple if-then-else formula will suffice here. In any blank column, type a formula in the second row in this format:

=IF([column with salutation]2<>”Mr.”,””,IF([column with gender]2=”Female”,”Check”,””))

Copy this formula down the list of constituents by clicking on the cell, then double-clicking the little green square on the bottom-right corner of the cell. Records where you might need to check the salutation will be marked appropriately. It doesn’t mean you need to necessarily need to change them—the salutation might be correct, you’ll just need to check them. To check for Mrs./Ms./Miss with male constituents, replace “Mr.” with the salutation you’re checking and “Female” with “Male”. You can check any other salutation/gender combination in the same way.

1. Checking ZIP Codes against cities AND COUNTIES AND TIME ZONES

This procedure is a little more complex. I’ve taken a ZIP Code-to-city and county list from <https://simplemaps.com/data/us-zips>, and I’m sending it along with this set of instructions. You’ll need to make sure there’s a column in your data set which matches the data set from the internet. For ZIP Codes, make a “ZIP 5” column by adding a column with the formula =LEFT([column with ZIP Code]2,5). That will get you the first five numbers in the ZIP Code in case you have any ZIP+4 Codes.

Take the file I’ve sent and copy it into your workbook as a new worksheet. Change the name of the new worksheet to “ZIP Codes”.

To compare the two files, you’ll need to use =VLOOKUP(). It’s a complex formula, but you’ll only need to fill in the blanks with this use. In any blank column, click on the first cell with data (i.e. in Row 2) and type the following formula:

=VLOOKUP([column where your ZIP Code is]2, 'ZIP Codes'!$A$1:$G$33100,2,FALSE)

Want to see what counties your prospects are in? Just change the above code to this:

=VLOOKUP([column where your ZIP Code is]2, 'ZIP Codes'!$A$1:$G$33100,5,FALSE)

One caveat to the county lookup: some very rural ZIP Code boundaries cross county lines, but it’s pretty rare.

Time Zones can be added with the following formula:

=VLOOKUP([column where your ZIP Code is]2, 'ZIP Codes'!$A$1:$G$33100,6,FALSE)

1. Counting changes in Raiser’s Edge

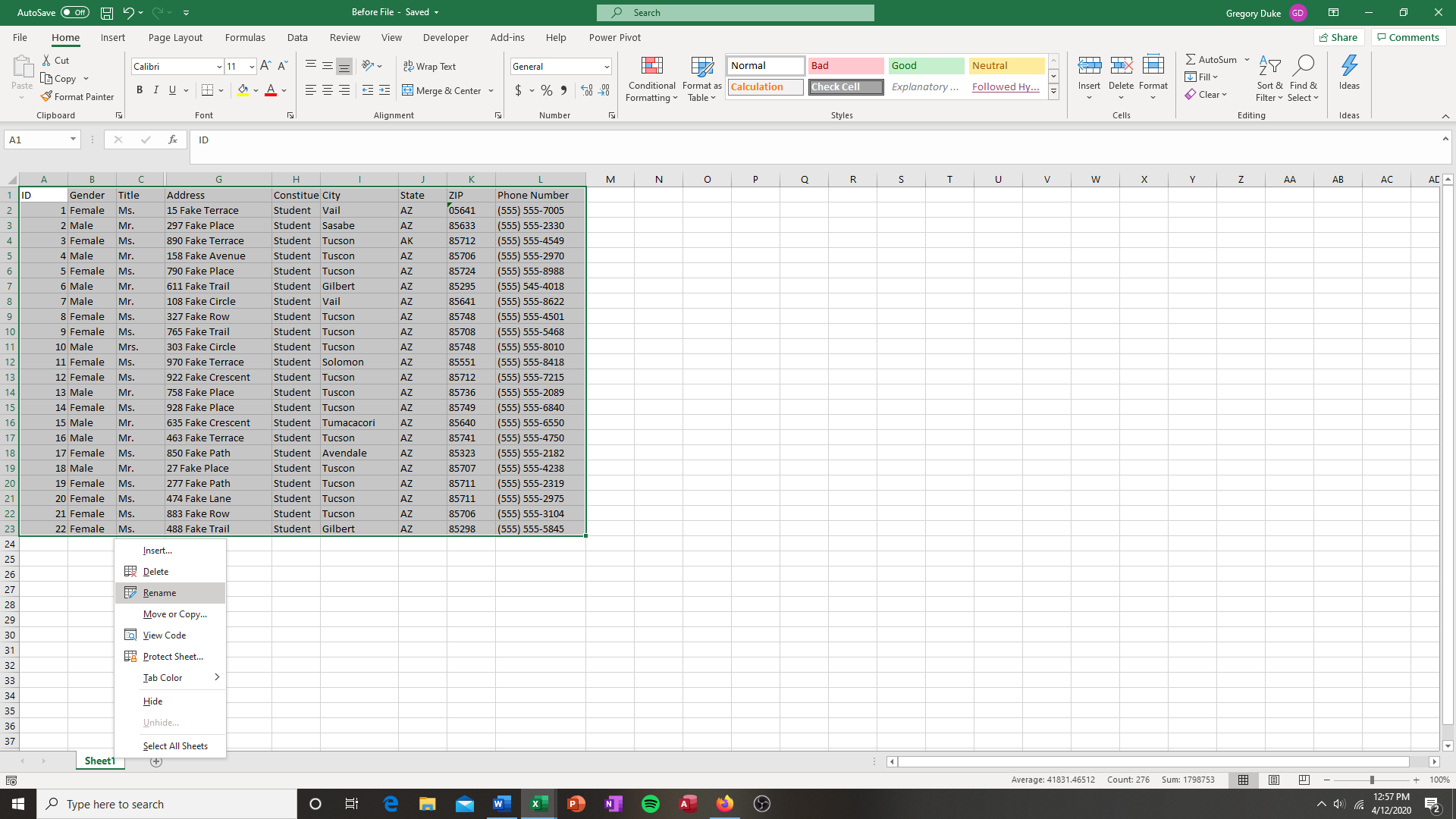
If your organization uses RE Audit, counting the number of changes made to fields in Raiser’s Edge is simple. However, if your organization doesn’t have Audit, there’s still a relatively simple way to count with number of changes over a given time period by field. You’ll have to start the audit process before you make the changes, though!

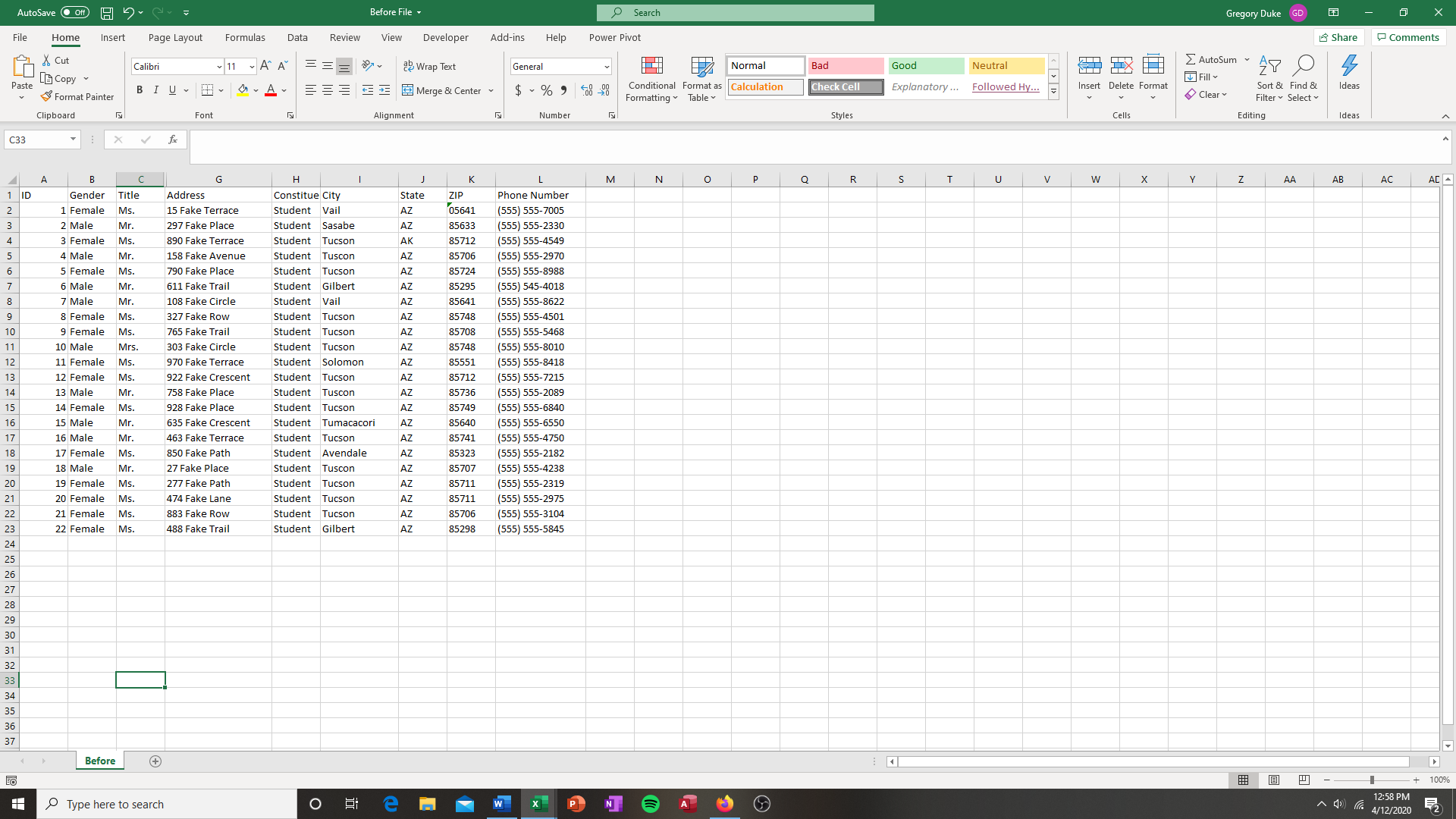
To start with, you’ll simply need to create a static query which contains all the constituent records in which you plan to make changes. It’s important that you create a static query for this example because you’ll need to have exactly the same records in the query whenever you decide to run it. Then create an export which contains the fields you intend to change (for example, Preferred Address fields, title and suffix fields, etc.) and use the static query as its selected fields. Use the export to create an .xls file—this will be the state of your fields before you make any changes, and it will look something like this (note: these are all randomly-generated fake names):

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ID | Gender | Title | Address | Constituency | City | State | ZIP | Phone Number |
| 1 | Female | Ms. | 15 Fake Terrace | Student | Vail | AZ | 05641 | (555) 555-7005 |
| 2 | Male | Mr. | 297 Fake Place | Student | Sasabe | AZ | 85633 | (555) 555-2330 |
| 3 | Female | Ms. | 890 Fake Terrace | Student | Tucson | AK | 85712 | (555) 555-4549 |
| 4 | Male | Mr. | 158 Fake Avenue | Student | Tuscon | AZ | 85706 | (555) 555-2970 |
| 5 | Female | Ms. | 790 Fake Place | Student | Tucson | AZ | 85724 | (555) 555-8988 |
| 6 | Male | Mr. | 611 Fake Trail | Student | Gilbert | AZ | 85295 | (555) 545-4018 |
| 7 | Male | Mr. | 108 Fake Circle | Student | Vail | AZ | 85641 | (555) 555-8622 |
| 8 | Female | Ms. | 327 Fake Row | Student | Tucson | AZ | 85748 | (555) 555-4501 |
| 9 | Female | Ms. | 765 Fake Trail | Student | Tucson | AZ | 85708 | (555) 555-5468 |
| 10 | Male | Mrs. | 303 Fake Circle | Student | Tucson | AZ | 85748 | (555) 555-8010 |
| 11 | Female | Ms. | 970 Fake Terrace | Student | Solomon | AZ | 85551 | (555) 555-8418 |
| 12 | Female | Ms. | 922 Fake Crescent | Student | Tucson | AZ | 85712 | (555) 555-7215 |
| 13 | Male | Mr. | 758 Fake Place | Student | Tuscon | AZ | 85736 | (555) 555-2089 |
| 14 | Female | Ms. | 928 Fake Place | Student | Tucson | AZ | 85749 | (555) 555-6840 |
| 15 | Male | Mr. | 635 Fake Crescent | Student | Tumacacori | AZ | 85640 | (555) 555-6550 |
| 16 | Male | Mr. | 463 Fake Terrace | Student | Tucson | AZ | 85741 | (555) 555-4750 |
| 17 | Female | Ms. | 850 Fake Path | Student | Avendale | AZ | 85323 | (555) 555-2182 |
| 18 | Male | Mr. | 27 Fake Place | Student | Tuscon | AZ | 85707 | (555) 555-4238 |
| 19 | Female | Ms. | 277 Fake Path | Student | Tucson | AZ | 85711 | (555) 555-2319 |
| 20 | Female | Ms. | 474 Fake Lane | Student | Tucson | AZ | 85711 | (555) 555-2975 |
| 21 | Female | Ms. | 883 Fake Row | Student | Tucson | AZ | 85706 | (555) 555-3104 |
| 22 | Female | Ms. | 488 Fake Trail | Student | Gilbert | AZ | 85298 | (555) 555-5845 |

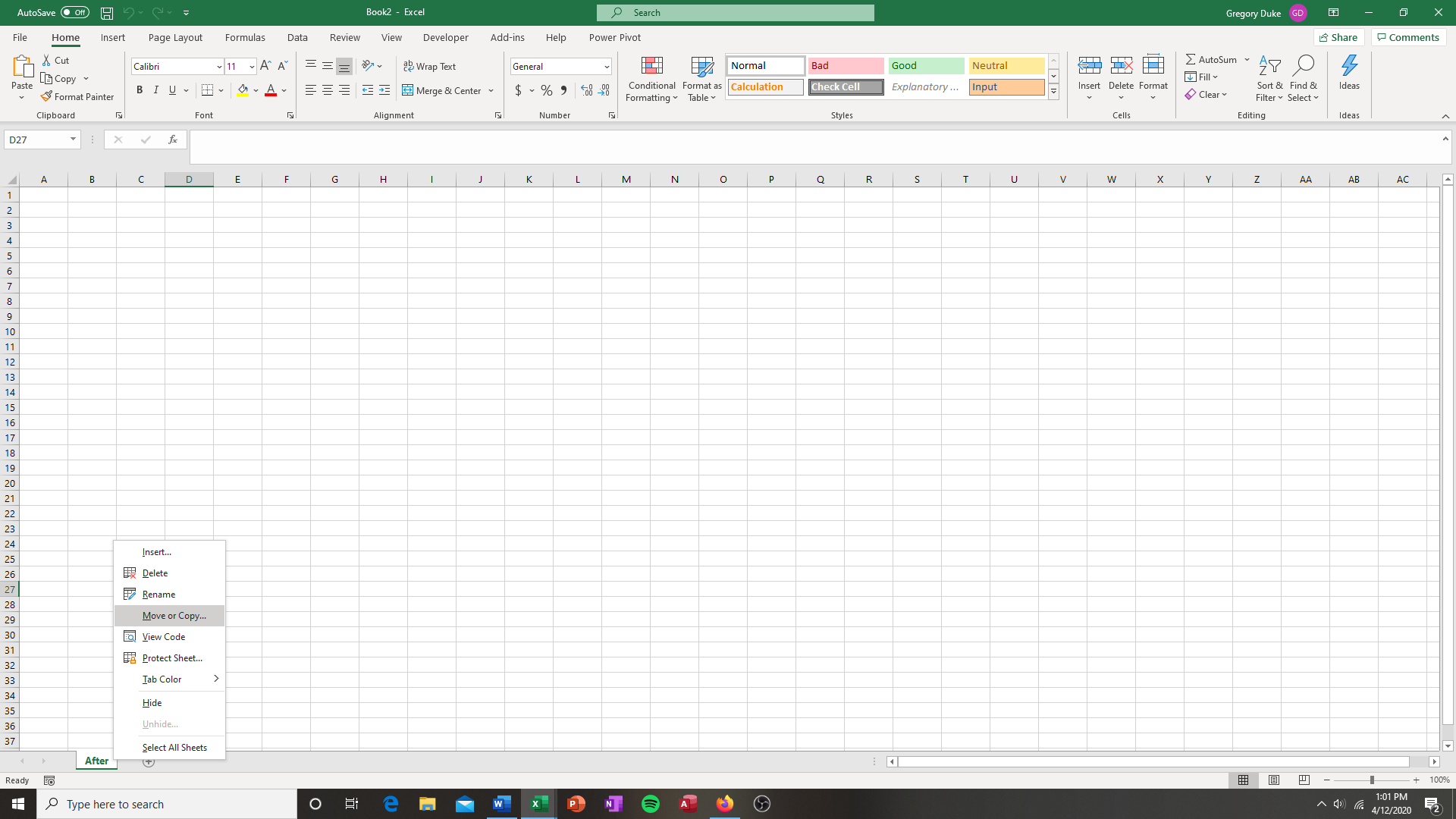
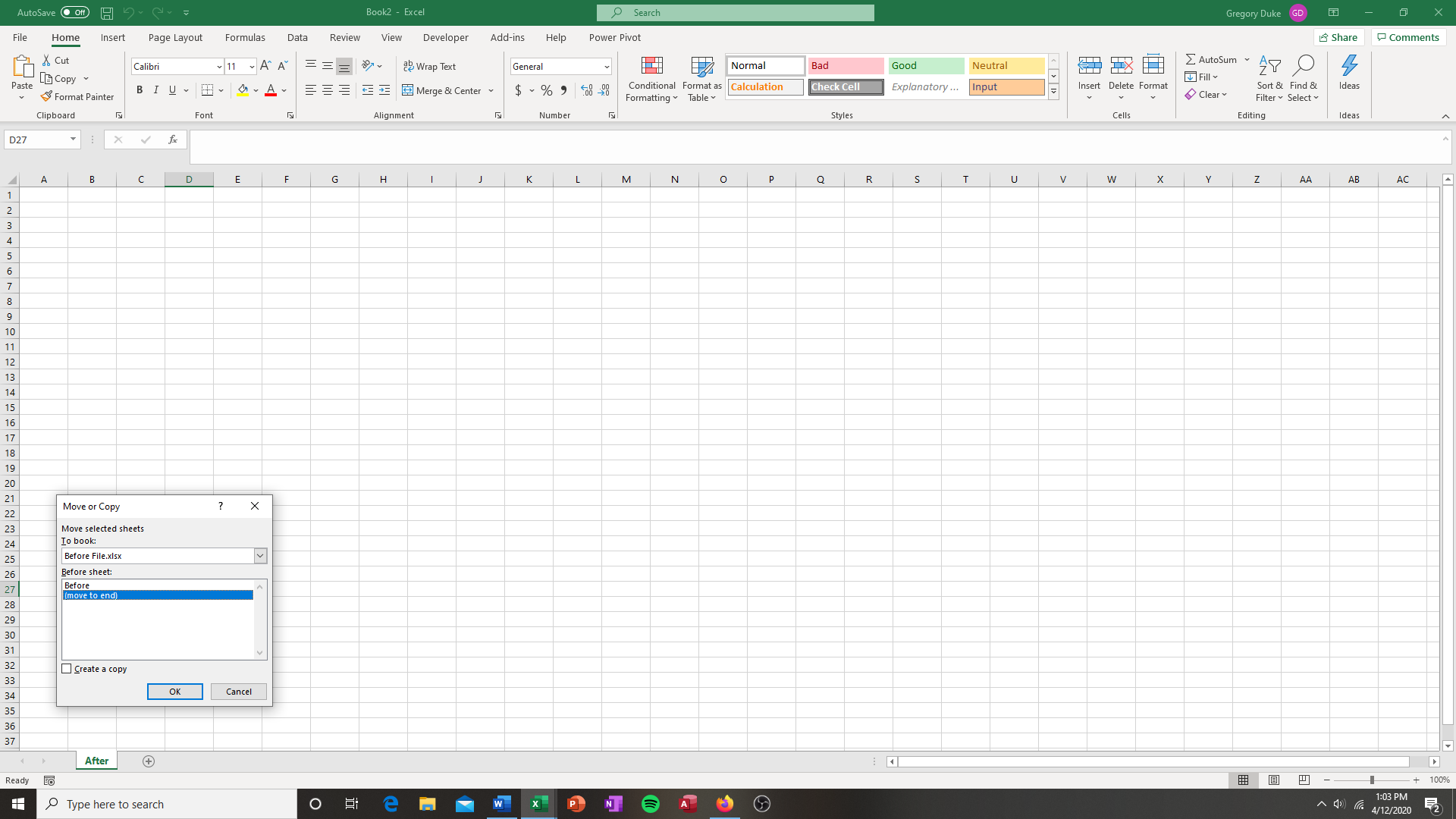
This will serve as your “before” file. After you’re done with your changes, you’ll create an “after” file simply by running the same export with the same static query.

Now you’ll need to move the “after” file into the same workbook as the “before” file. First, open up both the before and after files. Right-click on the worksheet tab (it’s at the bottom-left of your screen) on the before file and change its name to “Before”.

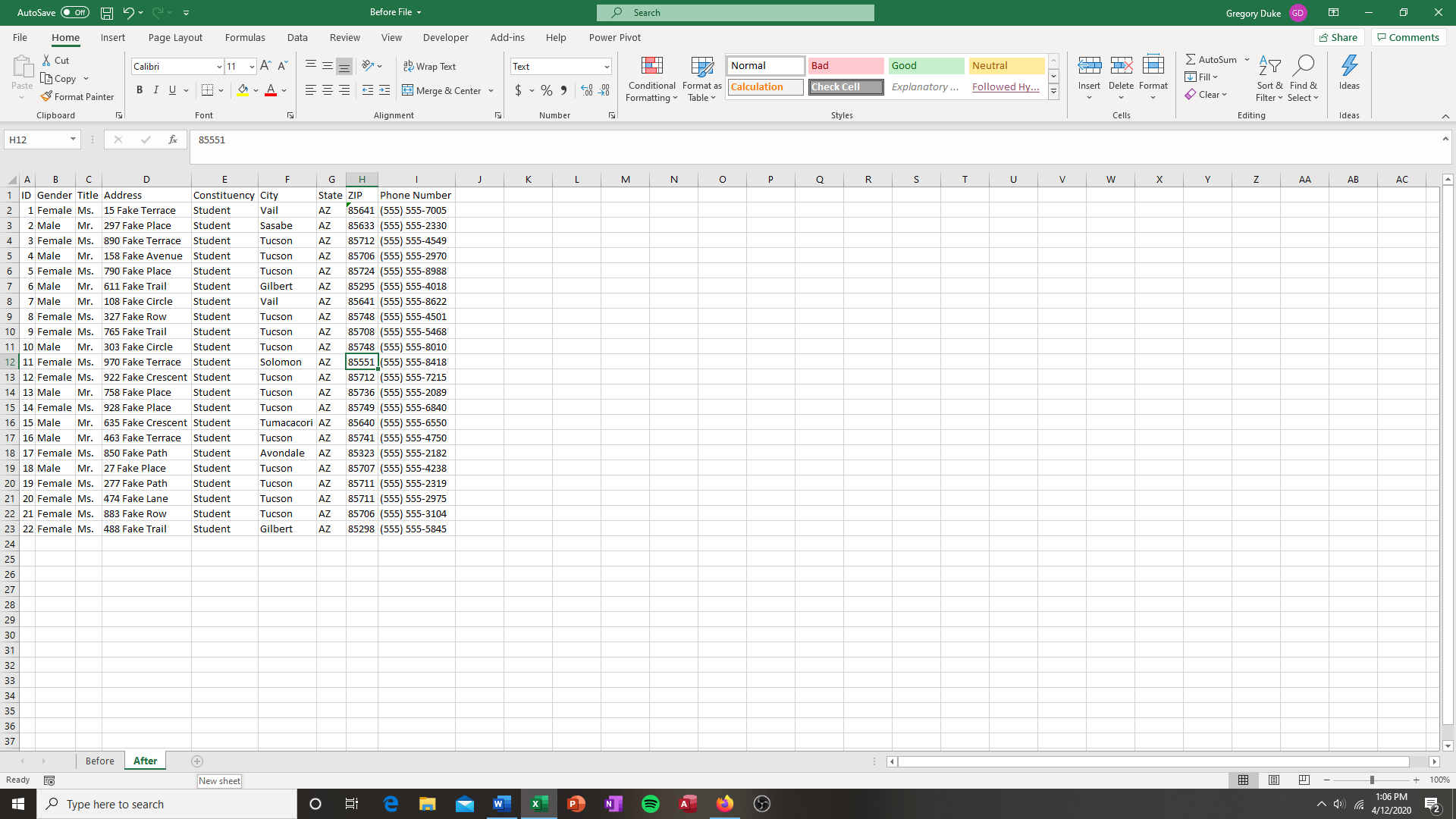




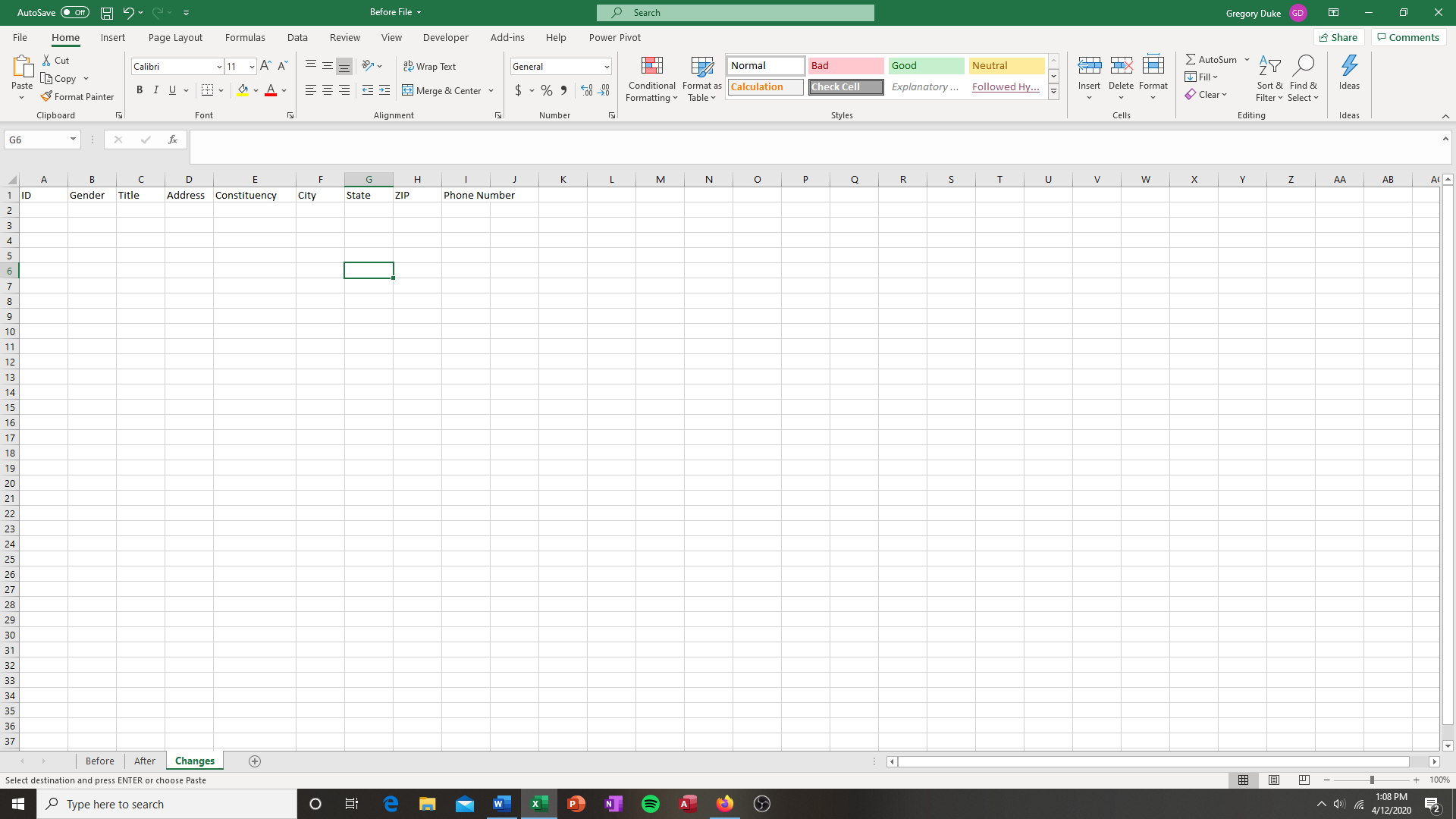
Change the worksheet tab in the “after” file to “After” in the same way. Next, click the “After” worksheet tab and select “Move or Copy”. Select under “Move to Selected Sheets – To Book” your “before” file, and under “Before sheet” “(to the end)”.



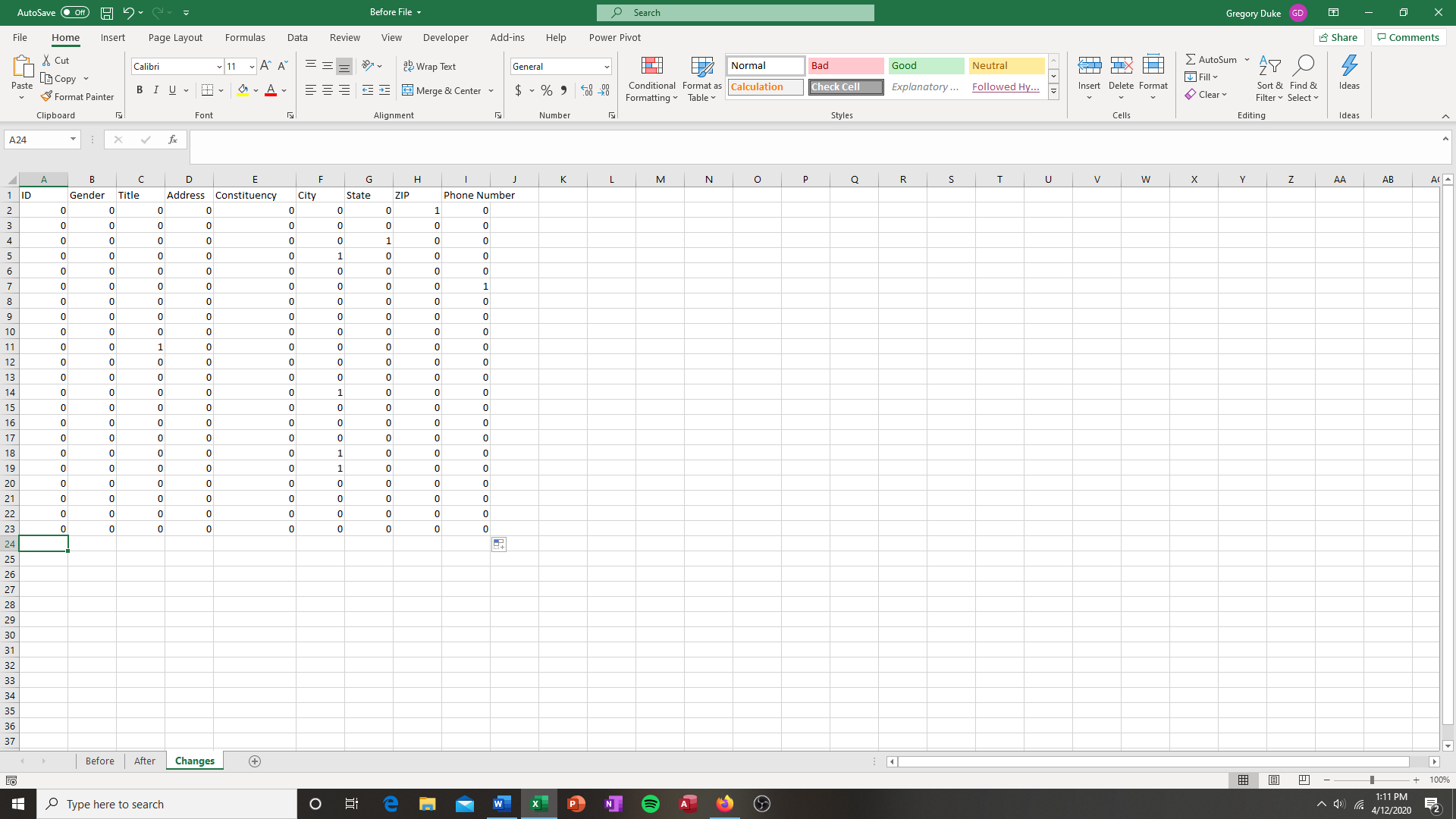
In your before file you’ll see both sheets—now we need a way to compare the two. Add another sheet to the workbook by clicking the “plus” sign next to the “After” tab:



…and right-click again to call the new sheet “Changes”. Copy the header names (the first row of data with the column names) to the “Changes” sheet:



In cell a2, type the following formula: =IF(Before!A2=After!A2,0,1). Copy this formula across as many columns as you have, and then down as many rows as you have records in the Before and After sheets, until you have a grid of 0s and 1s:



At the bottom of each column enter a sum field (=sum(a2:a23) in this case) and copy it across each column. This sum row will tell you exactly how many changes have been made to each field!

