



Grow Your Own Business™

TRAINING NOTES

Correcting Incorrect Case formatting and cleaning up an existing Database

Applies to: MYOB RetailManager EzyWine Excel

Issue:

An existing database may have the following common errors:

- First and last names have been entered in Upper Case, or all lower case. This means that letters sent via post or email will be addressed to :“Dear CATHY”, OR “Dear cathy”. Totally ruins the impact of the personalisation.
- Suburb and State name have been entered in lower case – should be all UPPER CASE to meet Aus Post addressing guidelines.
- Street 1 and 2 addresses have been entered in UPPERCASE – needs to be Title Case to meet Aus Post addressing guidelines – also looks much more personalised.
- SUBURBS have been entered into the incorrect field – eg – Street 1.

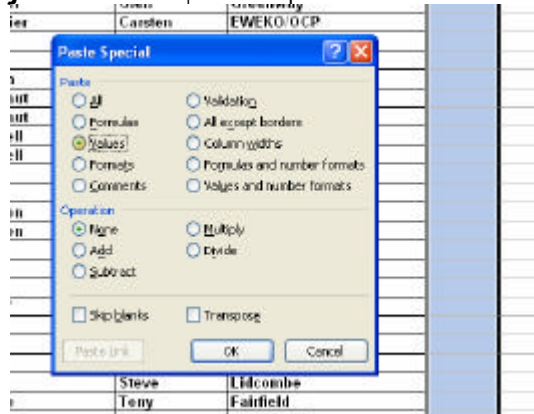
Resolution:

The easiest way to clean up a database in Excel – it is much easier to see what is happening, and see where incorrect fields have been entered. Export the customer base to Excel, clean it up, and then import back in to your existing programme.

Instructions:

1. To change the case of a field

- a. Insert 2 columns next to the field which requires correct case formatting – eg – “First Name”
- b. Go to the first cell in line 2 of this column – leave Row 1 for the Title.
- c. Go to Insert | Function, select “PROPER” from the “Text” menu.
- d. Select the cell next to this with the First Name in – press Enter to complete the formula.
- e. The cell should now be showing the first name with the first letter Capitalised.
- f. Copy the formula down to the end of the entries.
- g. Select this column with the correctly formatted text.
- h. Go to Edit | Copy.
- i. Now select the additional blank column you added in step 1.
- j. Go to Edit | Paste Special.



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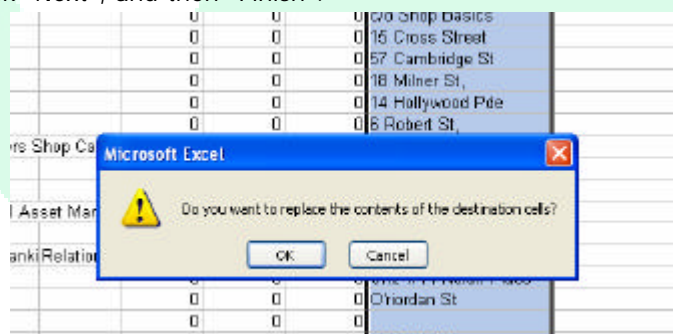
- k. Now select "Values", under the Paste selection as in the previous illustration, and select OK.
- l. Delete the original column with the incorrectly formatted names in, and the 2nd column you created with the "Proper" formula.
- m. Add the column name to the new column you have just created.
- n. To change other incorrect case formats repeat the above for each column – you also have the choice of "Upper" (for all Caps – for Suburb and State) and "Lower" – this you would not normally require in cleaning up a database.

2. To correct incorrect placement of fields:

- a. There is no easy way to do this other than to drag them to their correct position. Often, the suburb will have been entered in "Street 2". The easiest way to speed this up, is to do a sort on the "Street 2" column – ENSURING THAT YOU "EXPAND THE SELECTION" prior to your sort. All the blank fields will be at the top or bottom. You can then select fields in a block and drag them across.

3. To split fields where the first names and surnames have been entered in the one field.

- a. Check your data in the columns to find the maximum number of words in any one name field – the maximum will normally be 5 at the most.
- b. Insert this number of new columns next to the "name" columns.
- c. Select the column with the name field.
- d. Go to Data | Text to Columns. You will be taken to the "Text top Columns" wizard.
- e. In step 1 of the Wizard, ensure the file type "delimited" is selected. Click Next.
- f. Check the box next to "Space", to select that as the delimiter. (If you are splitting address fields, the "delimiter" may be a ",".)
- g. Click "Next", and then "Finish".



- h. If the above message is displayed, then you have not added enough columns. If you press OK here, you will overwrite information you have in other cells. So cancel the operation, and add enough new columns to accommodate the number of words.

4. Initials only entered in first name:

- a. A customer may have only given their name as "A. Smith". If you place the "A" in the first name field, then all mail merge correspondence will be addressed to "Dear A". See Training Notes "Conventions for Entering Contact Information".