

## Clean the Data

Once in Excel, you'll need to clean the data to get it ready to submit to Broadly and Zoho

### 1. Sort data by Email

- Delete all rows that are missing an email address
- Delete all rows that are Inventory Adjustments and have [cayala@stuartrental.com](mailto:cayala@stuartrental.com) as the email address
- Delete all rows that only have an email for the Accounts Payable department (e.g. [ap@company.com](mailto:ap@company.com) or [invoices@company.com](mailto:invoices@company.com))
- Delete all rows that are duplicates (due to multiple contracts for the same event)
- If more than one email is listed, delete all but the email of the **Contact Name**
- Delete all rows where the **Contact Name** and **Email** do not match

THE BARTENDING BABES	DESHAWN	deshaun_butter@yahoo.com
MORPHO DETECTION	RAE WILLIAMS	dfanucch@morphodetection.com, morphoinvoices@epayablesmanager.com
VECTRA NETWORKS	DENA HOUSE 408.813.1333	dhouse@vectranetworks.com
LALWANI, DILIP	DILIP LALWANI	dlalwani@gmail.com

- Delete any phone numbers or extensions in the **Contact Name** cells

MORPHO DETECTION	RAE WILLIAMS	dfanucch@morphodetection.com, morphoi
VECTRA NETWORKS	DENA HOUSE 408.813.1333	dhouse@vectranetworks.com
LALWANI, DILIP	DILIP LALWANI	dlalwani@gmail.com
CAL BERKELEY ALUMNI ASSOCIATIO	DONNA HOUSER 510.900.8229	donna.houser@alumni.berkeley.edu
TAYLOR, CELESTE	CELESTE TAYLOR	dougmtaylor@sbcglobal.net
LYKE NED	NED LYKE	eblyke@comcast.net

- If an email address has a space in front of it, delete the extra space
- Check for any obvious spelling errors and try to fix when possible

HOMEOWNER	LU, RACHEL	RACHEL LU	rachelp1099@gmail.com
HOMEOWNER	RAJESH, RAJSHREE	RAJSHREE RAJESH	rajshreegururaj@gmail.com
HOMEOWNER	WICK, TOLFI	TOLSI WICK	raytsw@comcast.net
CATERER/RESTAURANT	JALSA CATERING & EVENTS	RESHMI	reshmi@jalsasf.com
BUSINESS RETAIL	RR RFFD ENTERPRISES	RICHARD RFFD	richard@rbreedenterprises.com

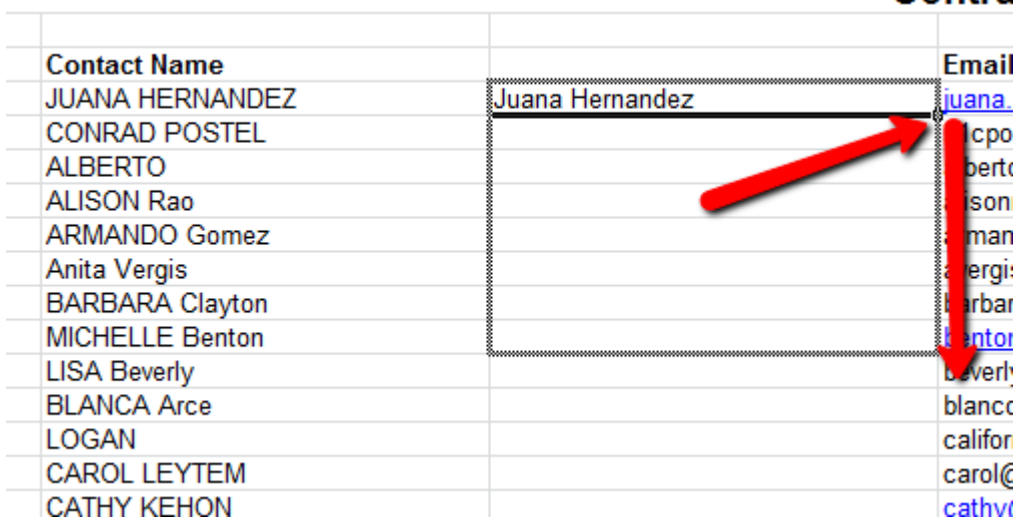
- Make sure the **Contact** is **First Name Last Name** wherever possible
  - It may be listed in the **Customer Name** cell if it is a Homeowner
  - It may be obtained by looking at the **Email**

SAVEUR PROVENCE	CATHY KEHON	<a href="mailto:cathy@saveurprovence.com">cathy@saveurprovence.com</a>
DAHL, CHANNING	CHANNING DAHL	channingdahl@yahoo.com
LAKE CHALET		chris@chaletmgmt.com
CHUCKQUE BBQ	CHUCK	chuckquebarbecue@gmail.com
BULLIS CHARTER SCHOOL	ORATHI MACDONALD	orathumacdonald@yahoo.com

- Sort by **Salesperson** and separate orders by location: Milpitas, Dublin, and San Jose
  - Generally, the location can be determined by the location of the Salesperson
    - Dublin includes Cindy Foster, Mark Pringle
    - San Jose is Lorie Cataelli
    - Milpitas is everyone else
  - However, there are exceptions to this rule: if the **DEL** (Delivery) and **PU** (Pick Up) fields **both** show a different location than where the Salesperson works, put that row into the location listed in **DEL/PU**
- Convert the **Contact Name** from **ALL CAPS** to **Proper Case**
  - Insert** a blank column to the right of the **Contact Name** column
  - In the first cell to the right of the top **Contact Name** entry, type **=proper(** > click on the contact name to the left > press **Enter** to convert it to Proper Case

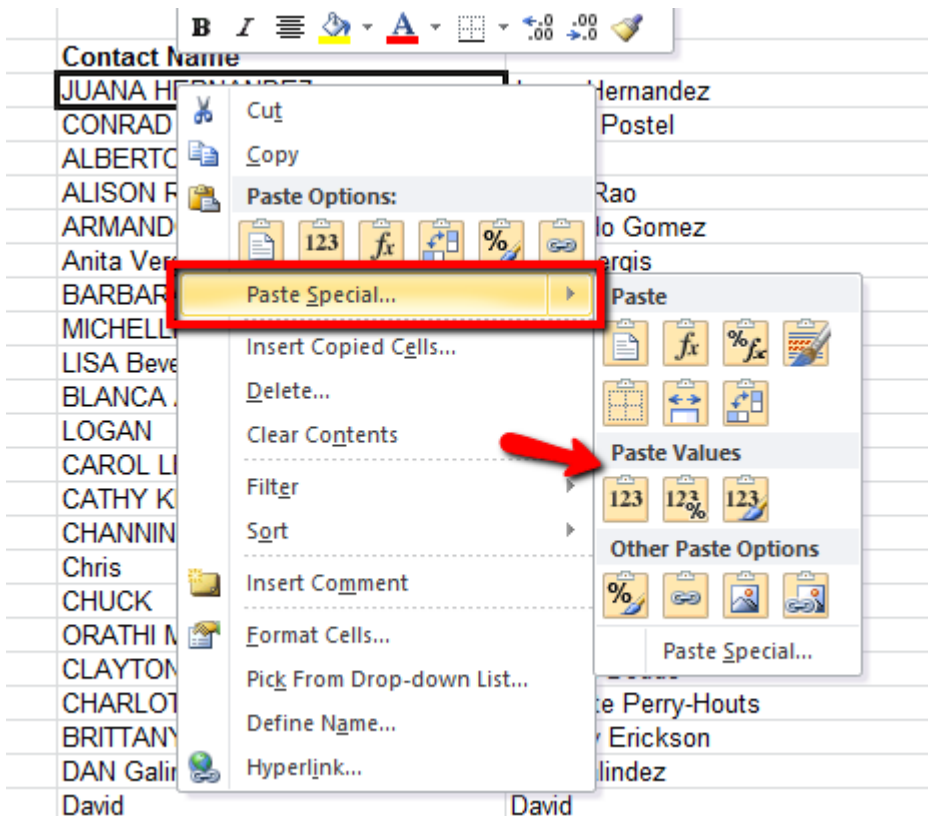
<b>Contact Name</b>		<b>Ema</b>
JUANA HERNANDEZ	=proper(H4)	juan
CONRAD POSTEL		31cp
ALBERTO		alber

- c. Click on the bottom right corner of the cell containing the Proper Case name, hold and drag it down to the last row of data



Contact Name	Email
JUANA HERNANDEZ	Juana Hernandez
CONRAD POSTEL	conrad.postel@cpo
ALBERTO	alberto@bert
ALISON Rao	alison@son
ARMANDO Gomez	armando@man
Anita Vergis	anita@ergi
BARBARA Clayton	barbara@rbar
MICHELLE Benton	michelle@nton
LISA Beverly	lisa@berly
BLANCA Arce	blanca@blanc
LOGAN	logan@califor
CAROL LEYTEM	carol@carol
CATHY KEHON	cathy@cathv

- d. Select all of the cells containing the Proper Case names and **Copy**
- e. Click on the top name of the **Contact Name** column > **right-click** > **Paste Special...** > **Paste Values**



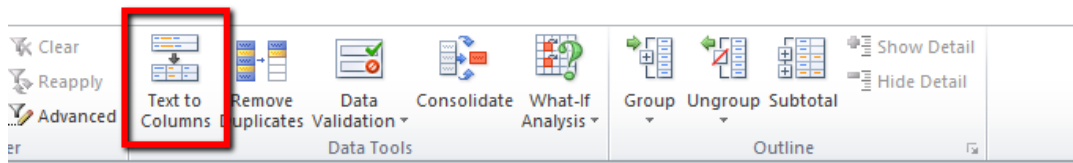
This will replace the ALL CAPS names with Proper Case names (that are not based on an Excel formula)

- f. Delete the data in the column you used the =proper( ) formula and just copied
3. Separate the **Contact Name** into **First Name** and **Last Name** columns

- a. **Insert 3 columns** to the right of the **Contact Name** column (this is in case there are more than First/Last names in the Contact Name column)

Kavita Agrawal
Katie Doernighausen
Kessia De La Cruz
Kevin Yen
Karen Lanfear

- b. Select all of the cells containing **Contact Names** and in the **Data** tab select **Text to Columns**



F	G	H
Business Type	Customer Name	Contact Name
Business RETAIL	COMPASS INTEL	Juana Hernandez
MEOWNER	POSTEL, CONRAD	Conrad Postel
OWNER/DESIGNER	DESIGNERS TOUCH	Alberto
MEOWNER	RAO, ALISON	Alison Rao
Business RETAIL	ARMANDO GOMEZ CONSULTING	Armando Gomez
MEOWNER	VERGIS, ANITA	Anita Vergis
DDING	CLAYTON, BARBARA	Barbara Clayton
OWNER/RESTAURANT	LIFEWORXS@EBAY	Michelle Benton

- c. Follow the **Convert Text to Columns Wizard**
  - i. In **Step 1** make sure **Delimited** is selected
  - ii. In **Step 2** check only the **Space** box and press **Finish**

Convert Text to Columns Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

☐ Tab

☐ Semicolon

☐ Comma

☒ Space

☐ Other:

☐ Treat consecutive delimiters as one

Text qualifier: " " ' ' >

Data preview

Juana	Hernandez
Conrad	Postel
Alberto	
Alison	Rao
Armando	Gomez

Cancel < Back Next > Finish

- d. When prompted with **Do you want to replace the contents of the destination cells?** Press **OK** (as long as you have 3 blank columns to the right of Contact Name)

- e. Combine any Last Names that are now in more than one column

Katie	Boennighausen		
Kessia	De	La	Cruz
Kevin	Yen		
Rachel	Lo		
Rajshree	Rajesh		
Reshmi			
Richard	Reed		
Amy	Frias		
Sabine	Van	De	Water
Sadaf	Skandari		

- f. You should now have **First Name** and **Last Name** columns

4. Review the **Business Type** column to make sure they are correct; the categories are:
- (B) BUSINESS RETAIL – A company that is “brick & mortar”; they sell products/services in a retail setting
  - (C) CATERER / (D) RESTAURANT – A catering company, individual caterer, or a restaurant
  - (T) CONSTRUCTION – A company offering construction services
  - (W) CORP. CATERER – A catering company providing services within a corporation's campus
  - (O) CORPORATE COMPANY – A large company that provides technology or web-based services and products (I think this may be a source of confusion for some)
  - (E) EMPLOYEE – Any Stuart Event Rental employee (even if it is rented to them using their personal email account or side-business)
  - (P) EVENTS/ENTERTAINMENT – A fair or festival or company that specifically organizes fairs and festivals - Combined with PLANNER/DESIGNER – An event planner or designer, including for weddings
  - (G) GOVERNMENT – A city, county, or government agency (e.g. police department, public library, public transit, etc.)
  - (H) HOMEOWNER – Someone holding a private event
  - (I) HOTEL/VENUE – A hotel, convention center, winery, meeting center, arena, or other location where event space is rented out
  - (M) MEDICAL/HOSPITAL – A medical services provider (hospital, HMO, medical offices, etc.)
  - (N) NON-PROFIT – A non-profit or not-for-profit organization that uses its proceeds to further its mission of serving a community or cause
  - RELIGIOUS – A religious-based organization
  - (S) SCHOOL/EDUCATION – A school, school district, community college, or university
  - (R) RENTAL CO. – A company that is a direct competitor or that we sub-rent from
  - VENDOR – A company that we purchase supplies, equipment, and services from

### Submitting Daily Emails to Broadly (for Customer Survey)

- Open the Broadly Internet Dashboard - <https://app.broadly.com>
  - Select the Add tab on the left side page column For each person on the list, enter the **First Name** (no Last Name) and **Email** on the Broadly subscriber page for the appropriate Stuart location
    - Milpitas - <https://app.broadly.com/#/58408c2e62d85a650034fd1f/add/one>
    - Dublin - <https://app.broadly.com/#/5865673133e39f66005bc087/add/one>
    - San Jose - <https://app.broadly.com/#/586567abbb8d906500b698f4/add/one>