Tips on Creating and Maintaining Data Lists in Excel for Mailings, Merges, Labels and Other Purposes

1. **Break Down Your Data Into Numerous Columns** In order to control where parts of names and addresses (and other particular bits of data) go on a page, label or form, <u>always</u> have a separate column for each piece of data. For instance, **never** had a column you've labeled as "Address" and include in that cell a street address, city, state and zip. If you do, you will never be able to sort it so that all the people or companies in a city or zip are together. **Instead**, create columns such as: First, Last, Company, Street, City, State, Zip and so on.

   Always think through the different kinds of information you are about to save on an individual, company or material thing. Think about ways you may want to sort the information and then create a column for that particular criteria. For instance, if you are creating a list of vehicles your company owns and know that someday you, or someone else, may want a separate listing of how many trucks and how many cars and how many bulldozers you have, make a column called "VehicleType" or "Type" and put what it is in every line that has information on an owned vehicle.

2. **Column Names** Keep the column names as simple and as short as possible and avoid spaces. For instance, don't name columns multiple names when one shorter and simpler name will do. The column name like "Street Address" would be better named "Street." The column name "Zip Code" would be better named "Zip." As a rule, it will serve you to not have spaces in a column name. This isn't a hard and fast rule but I have found it to save some problems in advanced import and export circumstances so try to do it whenever you can.

3. **Column Name Consistency in All Electronic Lists**. No matter how many lists you create and maintain separately in *Excel*, your life would be must easier (especially when it comes to mail merges and labels later on) to use the same column headings in as many of your *Excel* lists as possible. For instance, regularly use the columns named: Title, First, Last, Company, Street, City, State, Zip, wkphone, homephone, cell, email and so on. When you have other lists that will have additional fields (columns) such as their car type, their computer model, their employee start date, etc., you can obviously add those columns but at least the initial mailing and contact information tends to stay in the same order from one list to another. In fact, it would be a good idea to copy the structure of your most heavily used *Excel* list and rename it to make a new list (erasing the information in the columns in the initially copied list) and then add needed columns (fields) as needed for this new list.

4. **Column Order** When you name the column headings in *Excel*, tend to start from the left and go to the right as close to the order that you will use them. For instance, **don't** have your column headings haphazardly ordered: zip, children's names, street, phone, car type, city, etc. **Instead**, keep the order (left to right) in a logical use pattern such as: Title, First, Last, Company, Street, City, State, Zip, children's names, car type and so on.

5. **Accuracy in Entering Your Data** If you are getting the impression that setting up a spreadsheet for mailings and sorting your information is a little tedious, it is only beginning. When you type in the information in an *Excel* spreadsheet (or *Access* database), **you need to become a perfectionist.** That means that whatever you type into a cell, it's got to be *exactly right*. Nobody on this earth is going to fix it before it gets printed or mailed out except you. That goes for capitalized names, correct titles, name spellings, correct zip codes and addresses. If you are not cut out to put in the labor-intensive focus required for creating and maintaining a mailing list, outsource it. There are people who thrive on typing in data accurately. *Great will be their reward in heaven.*

   When it comes to zip codes, take the time to go to the USPS.com site, click on the "Find a Zip code" tab and get the complete zip + 4 code. You do this for two reasons: (1) the Postal System spent millions of dollars over two decades in trying to educate us to use the full zip +4 zip codes when mailing material. This is because it shaves time off the delivery time. You want your parties to get the mail quicker, right? (2) You want consistency and bulk (or large) mailings require consistency in the number of zip code characters that are included. If you have some addressees with only 5 characters of the zip and others with all 9 characters, they often have to be separated in a sort. "Go back and do it again" they'll tell you. So be your perfectionist inner self and do it right the first time. From the first moment you are putting in someone's contact information in a list, get it all right and make it consistent. You will definitely have less

headaches when the deadlines are upon you.

6. **Never have unnecessary spaces in your data** This is not only a rule that makes sorting more accurate, it is a standard rule for typesetting all documents. In data lists, if you have a space before an entry called "_Apple", after a sort, that entry may not be next to the other entries that have simply "Apple" in the same field. The only time in a data list you should have a space is between words such as in a cell that has multiple words like: "Two Ton Truck" or "Five Ton Truck." Never, unless terrorists are holding a bomb to your head, allow a space to start a cell (as in the Apple illustration above).

Advanced Tip (this requires a cup of coffee to stay with it)

While we are on this about spaces, elsewhere in your electronic writing, *always* avoid the use of two spaces like the plague. Here's the hard and fast rule for all electronic typesetting: **"Never have two spaces together in a document for any reason."** Here's why.

In the old days of typewriters, there were only two ways to get a word further over to the right on a page: by hitting the tab key to nudge it over to approximately within 5 or so spaces to where you'd like it OR by hitting your space key to move it over to within at least a space of where you'd like it.
Now days, computers mathematically calculate the proper space between each letter that is typed. Some letters look better next to others because of the type of letter they are and the type of letter next to it. We no longer use "monotype" characters where they are all the same width (as they were on typewriters). Now we use proportional spaced fonts on our

computers. We don't tap the space key after the closing period of a sentence. The computer calculates how much space is needed after a period and the type of the letter that follows it after one space.

Now we place words in exactly the location on a page we want but we do it in one of these ways (but never by hitting the space bar on our keyboard). Instead, we place words with precisely defined **tab stops** (in the paragraph formatting), in **alignment of precisely laid out tables** on the page or more rarely, in the use of drawn **text boxes**.

When you are working on your own or on someone else's work, you sometimes discover locations in the document where multiple spaces exist. To get rid of them all in *Word*, simply **do a search and replace**. That is, you'll tell the program to find every instance of two spaces next to each other and replace that instance with one space. You'll be surprised by the high number of multiple spaces typed next to each other because of our ages-old habit of hitting the space bar twice after a closing period in a sentence. You'll also be surprised to find that after you've found it has done (say) 130 replacements, if you do the same search and replace again, it will correct more. That's because on the first pass through, it didn't fix instances of 3 (or more) spaces in a row. You just keeping doing that search and replace until it reports that reports that it fixed 0 instances of them.