Export Pkg Addendum

Depending on how you're using the exported information, some organization and/or formatting may be required. Below are some tips you may find useful.

Formatting # of Employees Field

Excel interprets this value as a date by default (e.g. 1-4 = 4-Jan). Follow these steps to correct: -

| | | | | | | - | |
|------------|----------|-----------------|------------|------------------------|--|--|---|
| 14/ | V | 1 | I-2 | ≣ <u></u> → <u>A</u> · | | 1) | Highlight the entire column (employees) |
| vv | ^ Icm | omploye | Xc | ut AA | | 2) | Right-click and choose 'Format Cells' |
| | 1 //29 | employe A-la | | opv | | 3) | Lick on the Custom category |
| ROCKWO | 1.425 | 9-Ma | | aste Ontions: | | 4) 5) | Click 'OK' to apply |
| | 2 178 | 20-49 | | | | 3) | |
| SELECTIVE | 2.170 | 4-la | P | | | | |
| NORGUAR | 1.602 | 19-00 | P | aste <u>S</u> pecial | | | 25 |
| SENTINEL | 1.531 | 20-49 | Ī | nsert | Y employ | /ee sale | Z AC AD AE AF AG A s premium cuase class3 class4 class5 classdesc classdesc class |
| CINCINNA | 0 | 19-00 | | elete | 4-J | an < \$* | Format Cells |
| EASTERN | 1.484 | 20-49 | c | lear Co <u>n</u> tents | 20-49 | ay - 4 | Number Alignment Font Border Fill Protection |
| ERIE INSUI | 1.673 | 4-Ja | | ormat Cells | 4-J 19-0 | an < \$ Oct \$1 | Category: |
| PENNSYLV | 1.728 | 9-Ma | | olump Width | 20-49 19-0 | \$1 | General Sample Number employees Currency Image: Currency |
| STATE WO | 2.789 | 4-Ja | | lide | 20-49 | <\$ | Accounting Type: Date m-d |
| UPMC HEA | 1.391 | 20-49 | | ide | 4-J 9-M | an < Ş ay < Ş | Percentage General A |
| PEERLESS | 2.874 | 50-99 | | Inhide | 4-J 20-49 | an <\$ | Scientific 0.00 E Text #,##0 |
| Results: | | | - | | 50-99 20-49 4-J 9-M 9-M 9-M 4-J 9-M | 3) \$5 an \$5 ay < \$ ay \$1 ay \$1 an < \$ ay < \$ | Custom #,##0.0;(#,##0) #,##0.0;(#,##0) #,##0.0;[Red](#,##0.00) #,##0.00);[s,##0.00) #,##0.00) #,##0.00);[s,##0) \$\$\$;#,##0.00] #,##0.00);[s,#,#0] \$\$\$ Type the number format code, using one of the existing codes as a starting point. Delete |
| | Y | Z | AA | | 4-J 4-J 4-J | an < \$ an < \$ | OK Cancel |

| Y | Z | AA |
|----------|---------------|---------|
| employee | sales | premium |
| 1-4 | < \$1 Millio | n |
| 5-9 | < \$1 Millio | n |
| 20-49 | < \$1 Millio | n |
| 1-4 | < \$1 Millio | n |
| 10-19 | \$1 - \$4.9 N | lillion |
| 20-49 | \$1 - \$4.9 N | lillion |
| 10-19 | < \$1 Millio | n |
| 20-49 | < \$1 Millio | n |

Combining Contact Columns

- Follow these steps to combine contact fields into 1 column:

| Data Rev | | view | Vi | ew | Dev | veloper K | : | |
|--------------------------------|--|----------|----------|--------------------|-------|---------------------|-------------------------------|--|
|) | Connect Properti Edit Link ctions | es cs | 2↓ Z↓ | A Z Z A Sort | so | Filter ort & Fil | K Clear Reapply Advance | |
| | A | Г | A | U | | AV | AW | |
| | name1 r | | name2 | | name3 | | name4 | |
| | Don Argatt | | t | | | | | |
| | David Sen | | | | ss | | | |

1) Click the 'Data' tab in Excel in choose 'Sort'

2) Do a multi-level sort for the contact field you want combined into a single column (e.g. name1, name2, name3, etc)

3) Scroll your list and cut/paste info into single column

| AT | AU | AV | AW | AX | AY | AZ | BA | BB | |
|------------------------------|-----------|---------------------|----------------------------|-------|---------|--------|---------|------------------------|--|
| name1 | name2 | name3 | name4 | name5 | name6 | name7 | name8 | name9 | |
| Don Argat | tt | | | | | | | | |
| | David Ser | iss | | | | | | | |
| | | | | | | | | | |
| Sort | | | | | | | | ? × | |
| ₽ _à j <u>A</u> dd | Level | <u>D</u> elete Leve | I 🕒 Сору | Level | _ Optic | ons | 🔽 My da | ita has <u>h</u> eader | |
| Column | | | Sort On | | | Order | | | |
| Sort by | name1 | | Values | | - | A to Z | | - | |
| Then by | name2 | | Values | | - | A to Z | | - | |
| Then by | name3 | | Values | | - | A to Z | | - | |
| Then by | name4 | | Values | | • | A to Z | | • | |
| Then by | name5 | | Values | | - | A to Z | | - | |
| Then by | name6 | | Values | | • | A to Z | | • | |
| | | | | | | | ОК | Cancel | |
| Kaith Das | | | | _ | | 0 | _ | | |
| Keith Der | ose, Owne | er Ihme Ouum | | | | | | | |
| | wayne Jo | nns, Own | er | | | | | | |
| | | | | | | | _ | | |
| AT | A | 0 | AV | AW | AX | | | | |
| | | - | - | | | - | | | |

| AT | AU | AV | AW | AX | |
|------------|-----------|------------|------------|-------|---|
| name1 | name2 | name3 | name4 | name5 | 3 |
| Albert M | Vosburg | | | | |
| Anthony (| G Vennera | | | | |
| Barry Suss | man | | | | |
| Becky Wa | dsworth | | | | |
| | Adam Gar | dner | | | |
| | Alex Kouv | atsos | | | |
| | | Alice S Mo | ontgomery | | |
| | | ANDREW | S. JONES | | |
| ← | | | Alan J Han | nibal | |
| | | <u>A</u> | Albert Sch | midt | |

Repeat for any Contact fields you want combined

Removing Title from Contact Name

- Sometimes the title is included in the field for the contact's name. Do the following to remove this:

| Data Connect | Review | View D | eveloper | Kutools | Enterprise | Acrobat | | 2 | |
|------------------------------------|---|--|--|--|------------------------------------|--|------------|---|--|
| Propertie Edit Link nections | s Z | Sort Filter | Advanc | ed Colum | | Data s Validation Data Too | Consolida | ate What-If Analysis • | Group Ung |
| AO | AP | AQ | AR | AS | AT | AU | AV | | AW |
| email5 | email6 | email7 | email8 | email9 | name1 | name10 | name2 | name3 | |
| aenola.co | om | | | | | | | Alan Hauln | nan |
| | | | | | | | | Bernie Kolv | va, Owner |
| | | | | | | | | Bill Wurste | r |
| aol.co cles.cc rica.oi pm | he Text Wizar f this is correct Original data t Choose the fi © Delimi © Fixed | d has determin t, choose Next type lie type that be ted - Char width - Fields | izard - Step 1 ed that your d , or choose the est describes you acters such as s are aligned in | of 3 lata is Delimit e data type th our data: commas or ta columns with | ed. 2 hat because a spaces betw | ibes your dat each field. een each field | 2 . | X A Ed Ine Lu Shan Barr, I Boro / Lee Kump F Mc) JUA | wards eukus, Own non, Vice P Owner eman, Partn Turner of Clure REZ |



| | Convert Text to Columns Wizard | - Step 3 of 3 |
|------|---|--|
| 5.CC | This screen lets you select each co Column data format <u>General</u> <u>Text</u> <u>Date:</u> MDY Do not import column (skip) | umn and set the I mat. 'General' converts numeric values to numbers, date values to dates, and all remaining values to text. <u>A</u> dvanced |
| | Destination: \$AW\$1 | I |

| AW | AX |
|------------------|----------------|
| name3 | |
| Alan Haulman | |
| Bernie Kolva | Owner |
| Bill Wurster | |
| Bruce A Edwards | |
| Christine Leukus | Owner |
| Cinda Shannon | Vice President |
| Clyde Barr | Owner |
| Daniel Boreman | Partner |
| | |

1) Click the 'Data' tab in Excel in choose 'Text to Columns'

2) Select 'Delimited' and click 'Next'

3) Select 'Comma' as the Delimiter and click 'Next'

4) Make sure 'General' or 'Text' is selected and click 'Finish'