How to Automatically Conform your Address Records to the Postal Code Standard – Change things like Street vs St. for Consistency Prior to De-Duping Contact Records

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Overview

This article will teach you how to automatically **conform** your **address records** which will get rid of discrepancies between things like St., and Street. It also goes through the steps to set your **conform method** in your **Committee/Organization** record (*if it hasn't been set already*).

Tip: Learn a lot about address management for your database by reading this article. After running address cleanups it's a good idea to cleanup duplicate contact records, here's how.

Steps to Set the Conform Method in your Committee/Organization Record

Important: it's required that you set the 'conform method' prior to running the mass address conform operation on your database and this requires administrative access to the database.

Navigate to your **Organization** record (if nonprofit) or the **Committee** record (if political) by following **Application Menu > System Manger > Lists > Organization/Committee**.

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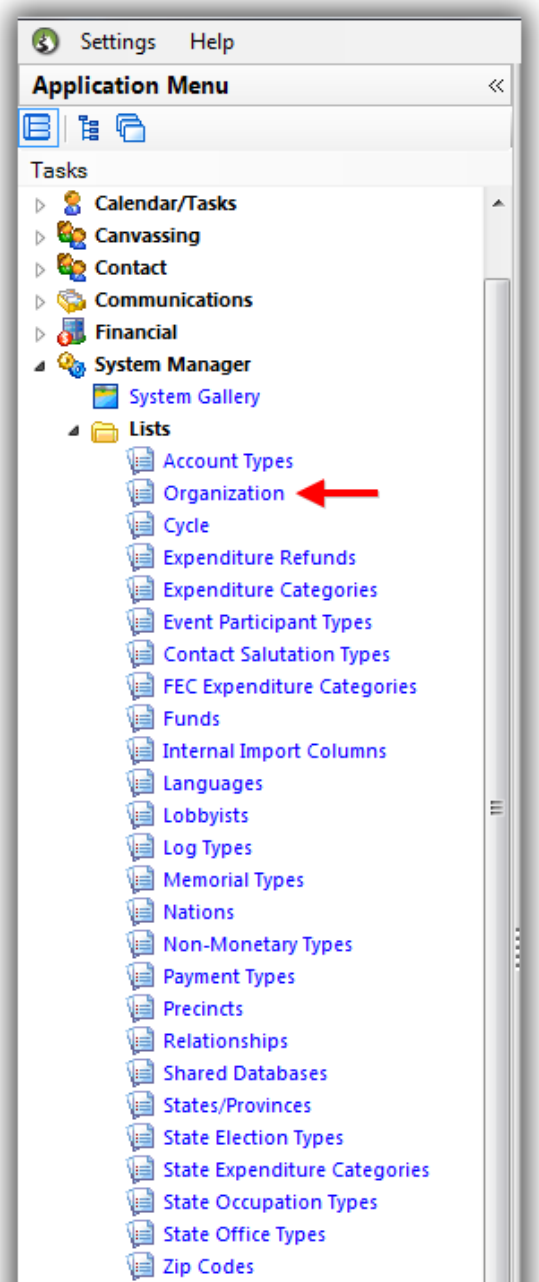
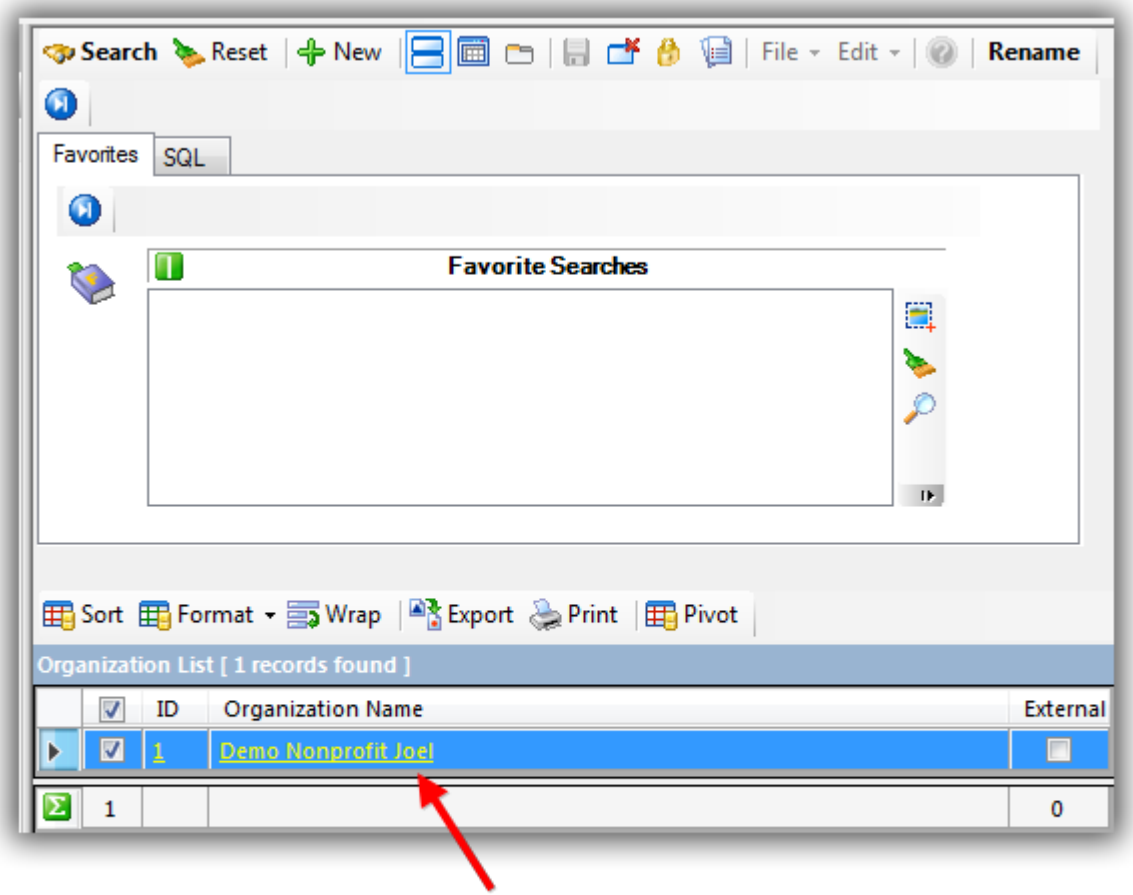


Click on the **name** to open your **Org/Committee** record card. *In this example it was called "Demo Nonprofit Joel".*



Click on the Org/Committee name to open the record card.

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Navigate to the **Settings** tab, select your **'Conform Method'** preference, and **[Save and Close]**. *In my example I selected the option **'Street direction on right (1372 Glenmoor Rd E'**.*

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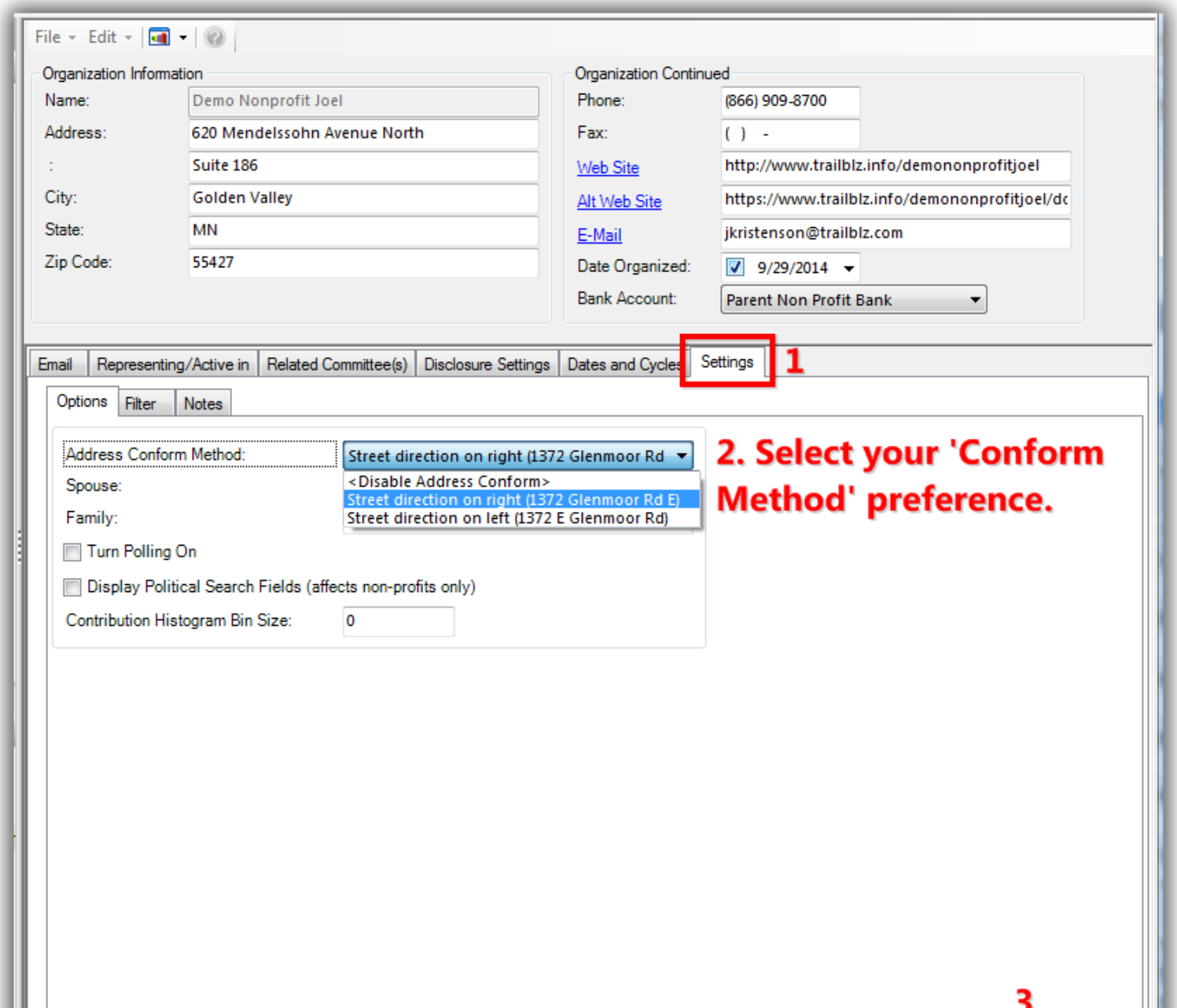

Steps to Conform Address Records En Masse

Note: you can conform **all** address records, or a segment of your database. In this *example* I updated **all** records.

Navigate to the **Addresses** list under the **Application Menu**.

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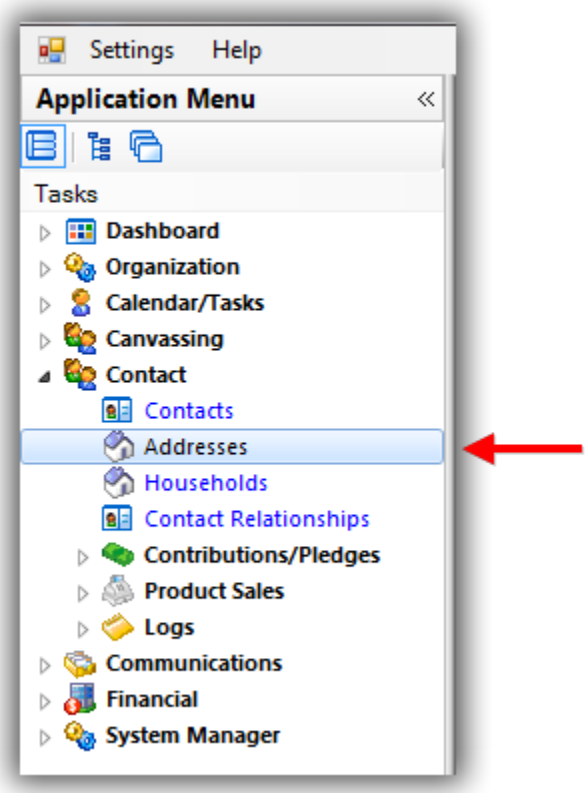

Click **[Search]** and load all records. *In this example I had **9,748** address records.*

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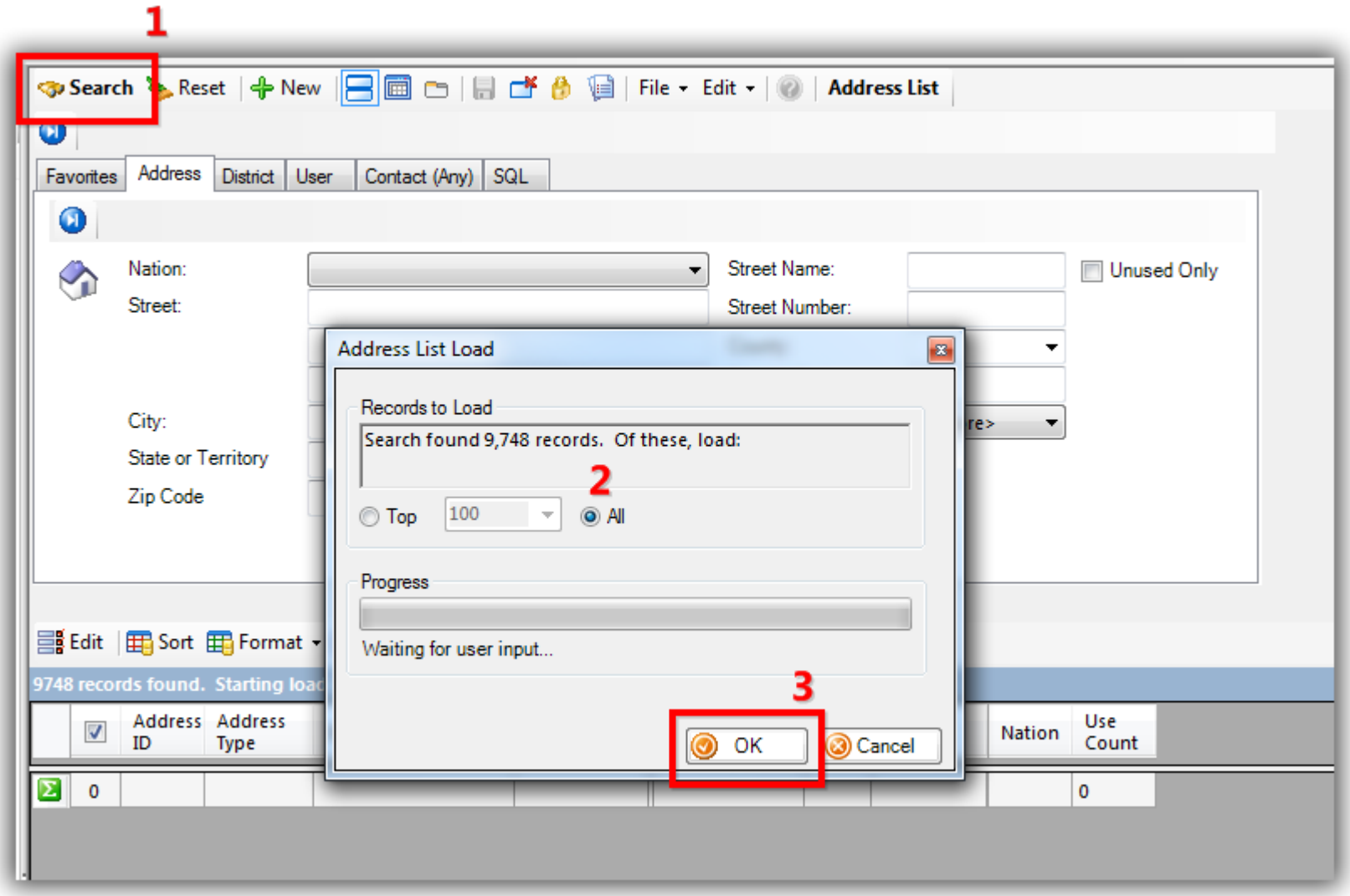

Select **File > Conform Addresses**.

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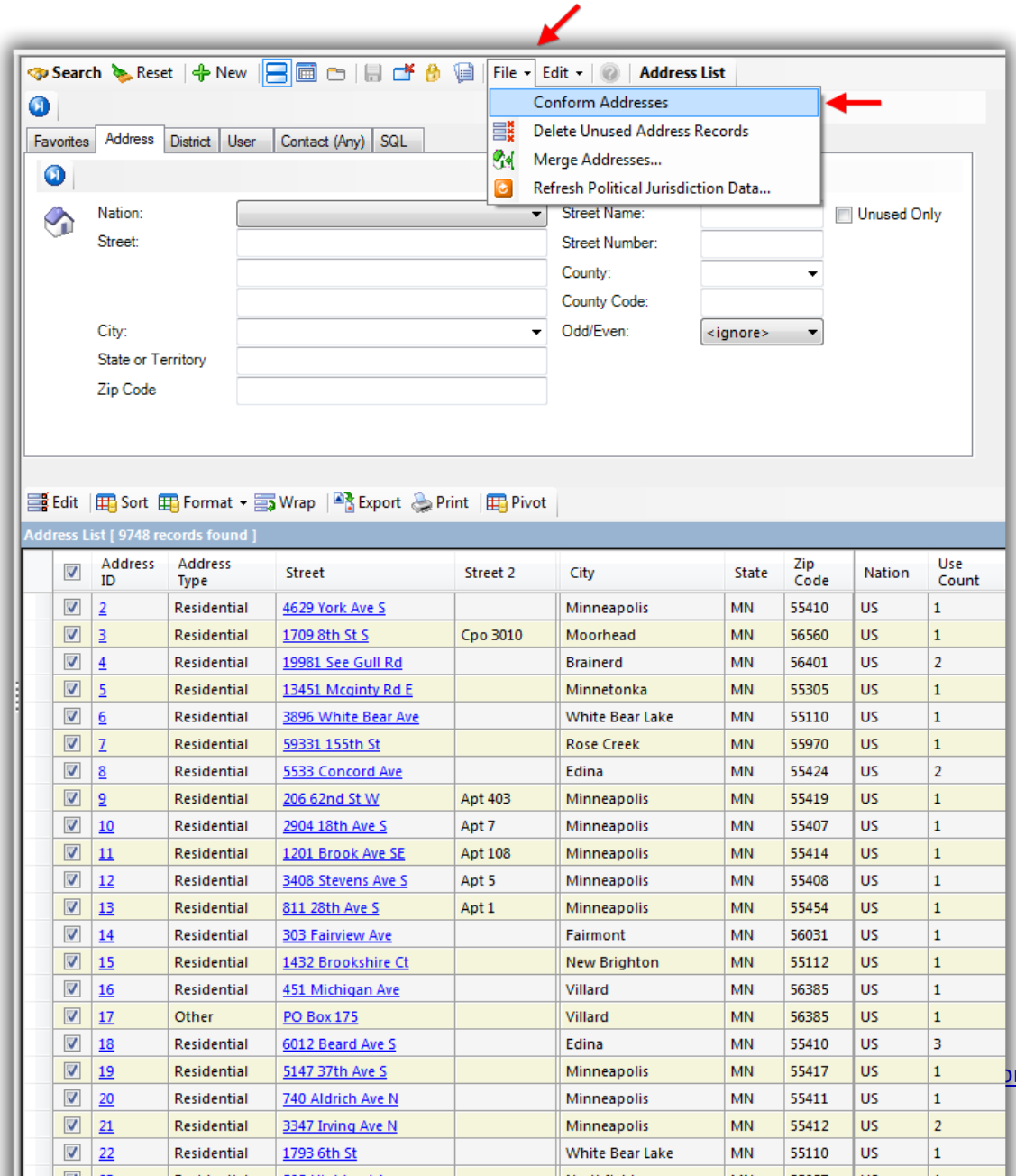
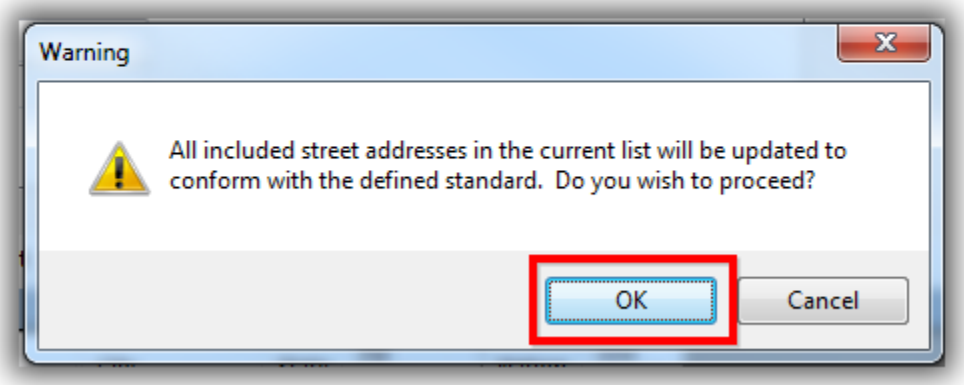


Address ID	Address Type	Street	Street 2	City	State	Zip Code	Nation	Use Count
2	Residential	4629 York Ave S		Minneapolis	MN	55410	US	1
3	Residential	1709 8th St S	Cpo 3010	Moorhead	MN	56560	US	1
4	Residential	19981 See Gull Rd		Brainerd	MN	56401	US	2
5	Residential	13451 Mcginty Rd E		Minnetonka	MN	55305	US	1
6	Residential	3896 White Bear Ave		White Bear Lake	MN	55110	US	1
7	Residential	59331 155th St		Rose Creek	MN	55970	US	1
8	Residential	5533 Concord Ave		Edina	MN	55424	US	2
9	Residential	206 62nd St W	Apt 403	Minneapolis	MN	55419	US	1
10	Residential	2904 18th Ave S	Apt 7	Minneapolis	MN	55407	US	1
11	Residential	1201 Brook Ave SE	Apt 108	Minneapolis	MN	55414	US	1
12	Residential	3408 Stevens Ave S	Apt 5	Minneapolis	MN	55408	US	1
13	Residential	811 28th Ave S	Apt 1	Minneapolis	MN	55454	US	1
14	Residential	303 Fairview Ave		Fairmont	MN	56031	US	1
15	Residential	1432 Brookshire Ct		New Brighton	MN	55112	US	1
16	Residential	451 Michigan Ave		Villard	MN	56385	US	1
17	Other	PO Box 175		Villard	MN	56385	US	1
18	Residential	6012 Beard Ave S		Edina	MN	55410	US	3
19	Residential	5147 37th Ave S		Minneapolis	MN	55417	US	1
20	Residential	740 Aldrich Ave N		Minneapolis	MN	55411	US	1
21	Residential	3347 Irving Ave N		Minneapolis	MN	55412	US	2
22	Residential	1793 6th St		White Bear Lake	MN	55110	US	1

Click **[OK]** when prompted (*if you are 100% sure you want to run this mass update operation*).

Click [OK] to proceed. Make 100% sure with your team that this is something you want to do prior to running the operation.



Once the process is finished you'll get a popup notification with the results, click **[OK]** to finish.

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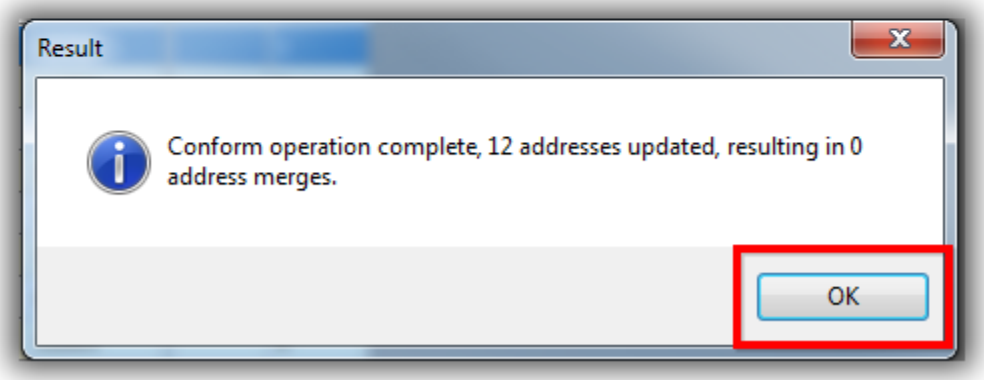
Tip: it's a good idea to sort by another column in the grid and run this operation until zero updates occur.



Tip: you should sort the list by another column (i.e. City or Zip Code) and re-run the process until the results are **zero**.

Take a look at the **related resources** below for a variety of other articles and videos on this topic.

Related Resources

Additional Service: NCOA/CASS Append
Article: Why won't some of my records merge?
Article: Managing Households – Creating, Deleting and Re-Creating
Article: Address Normalization (unlimited addresses per person)
Article: Address Management
Article: How to 'Manually Merge' Duplicate Contact Records with Drag-and-Drop
Article: How to Find Duplicate Contact Records by Identical *Primary* Email Address, and Automatically Merge them Together
Article: Find Possible Duplicates
Article: Rollback – Undo Function
Article: Refreshing your Address Records with Political Jurisdiction Data i.e. CD, SD, LD… (Only Applies to Customers who Live in a State we Provide Updated Voter Data For)
Article: Auto-Merging Duplicate Address Records
Article: Unable to Make A Change to an Address
Article: Address Normalization (unlimited addresses per person)
Video: Updating or Changing Data in a Field for all or Some of Your Records
Video: Households – What To Do B4 Householding!!
Video: Households – Drag n Drop
Video: Households – Delete and Recreate

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