


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*).

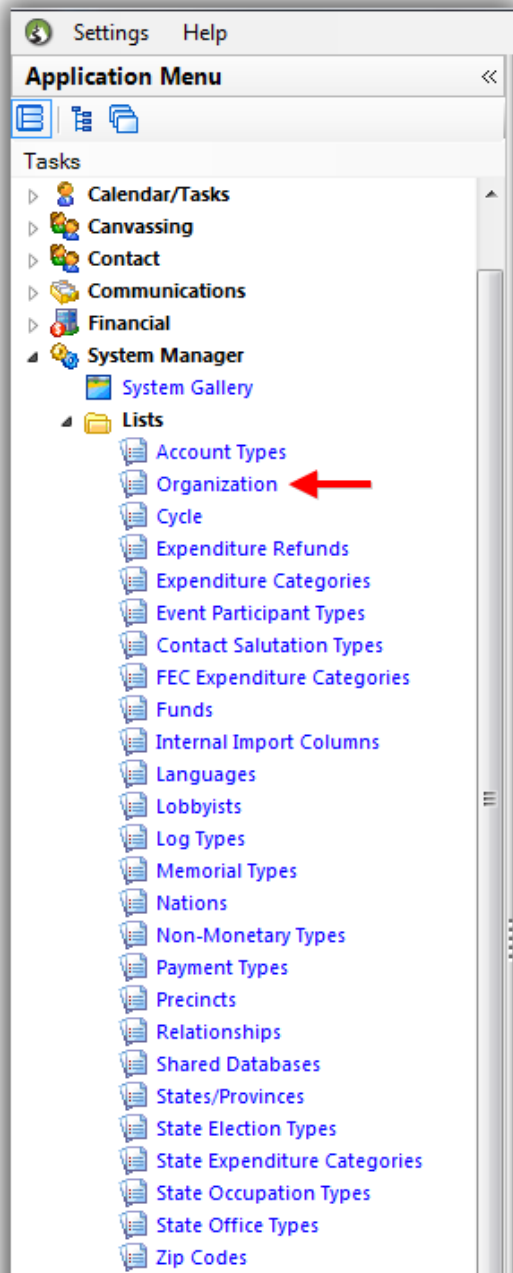
 **Tip:** Learn a lot about address management for your database by reading [this article](#). After running address cleanups it's a good idea to cleanup duplicate contact records, [here's how](#).

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**.

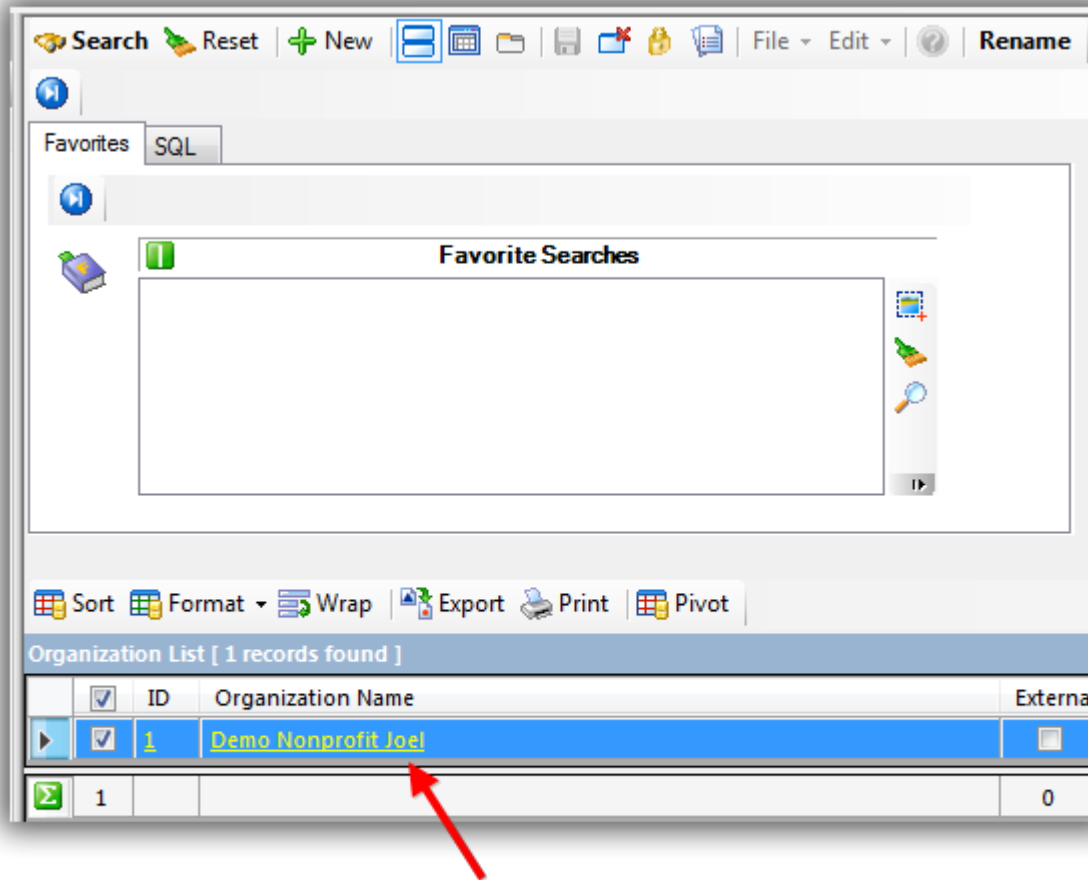
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Click on the **name** to open your **Org/Committee** record card. *In this example it was called “Demo Nonprofit Joel”.*

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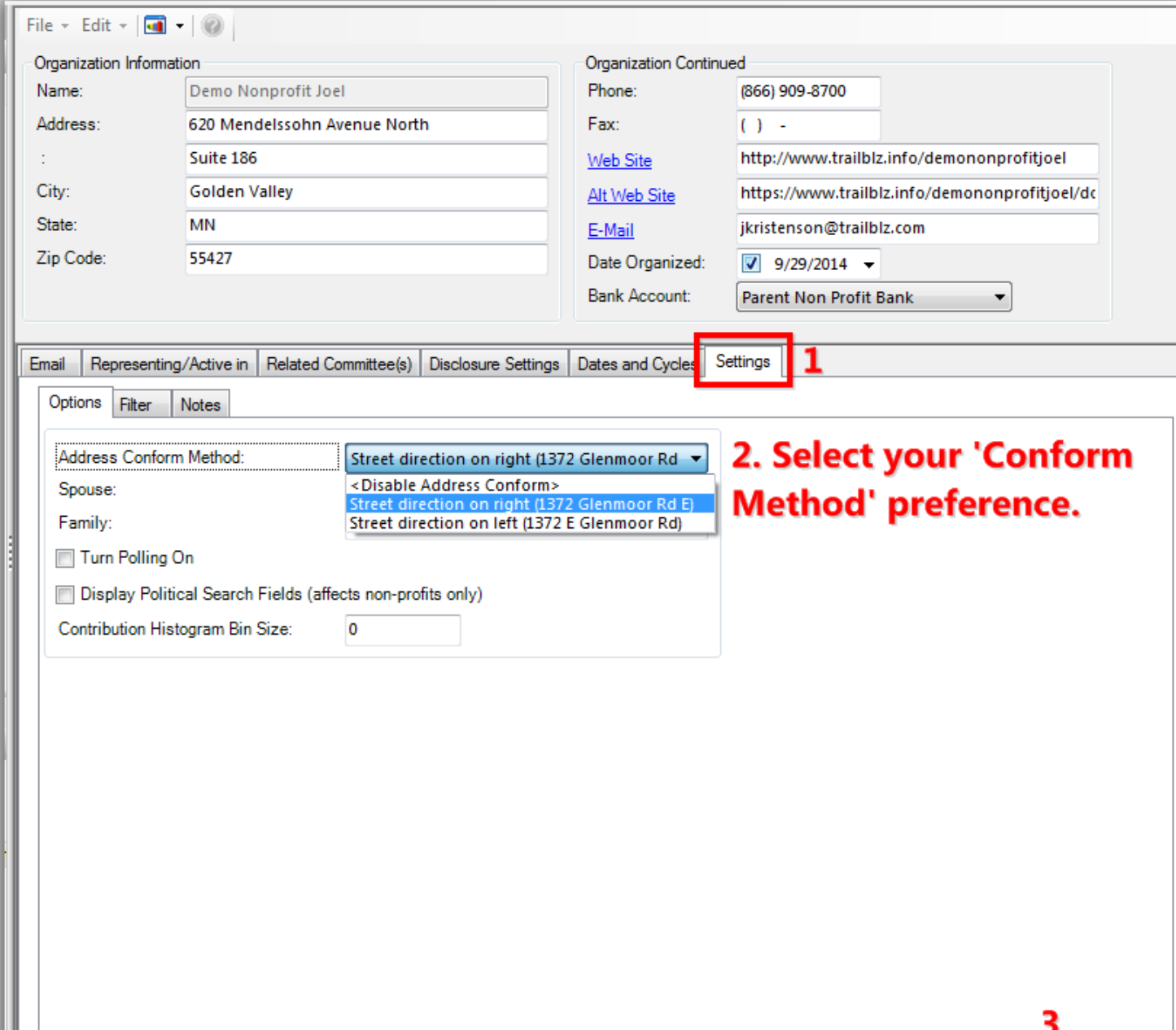


Click on the Org/Committee name to open the record card.

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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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The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with 'File', 'Edit', and a help icon. Below the menu bar, the 'Organization Information' section is visible, containing fields for Name, Address, City, State, and Zip Code. The 'Organization Continued' section includes fields for Phone, Fax, Web Site, Alt Web Site, E-Mail, Date Organized, and Bank Account. A red box highlights the 'Settings' tab in the navigation bar, with a red '1' next to it. Below the navigation bar, the 'Options' section is visible, featuring a dropdown menu for 'Address Conform Method' with a red '2' next to it. The dropdown menu is open, showing options like '< Disable Address Conform >', 'Street direction on right (1372 Glenmoor Rd E)', and 'Street direction on left (1372 E Glenmoor Rd)'. A red '3' is located at the bottom right of the interface. A red text overlay on the right side of the interface reads: '2. Select your 'Conform Method' preference.'

File Edit

Organization Information

Name: Demo Nonprofit Joel

Address: 620 Mendelssohn Avenue North

: Suite 186

City: Golden Valley

State: MN

Zip Code: 55427

Organization Continued

Phone: (866) 909-8700

Fax: () -

Web Site: <http://www.trailblz.info/demononprofitjoel>

Alt Web Site: <https://www.trailblz.info/demononprofitjoel/dc>

E-Mail: jkristenson@trailblz.com

Date Organized: 9/29/2014

Bank Account: Parent Non Profit Bank

Email Representing/Active in Related Committee(s) Disclosure Settings Dates and Cycles **Settings** 1

Options Filter Notes

Address Conform Method: Street direction on right (1372 Glenmoor Rd) 2

Spouse: < Disable Address Conform >

Family: Street direction on right (1372 Glenmoor Rd E)

Street direction on left (1372 E Glenmoor Rd)

Turn Polling On

Display Political Search Fields (affects non-profits only)

Contribution Histogram Bin Size: 0

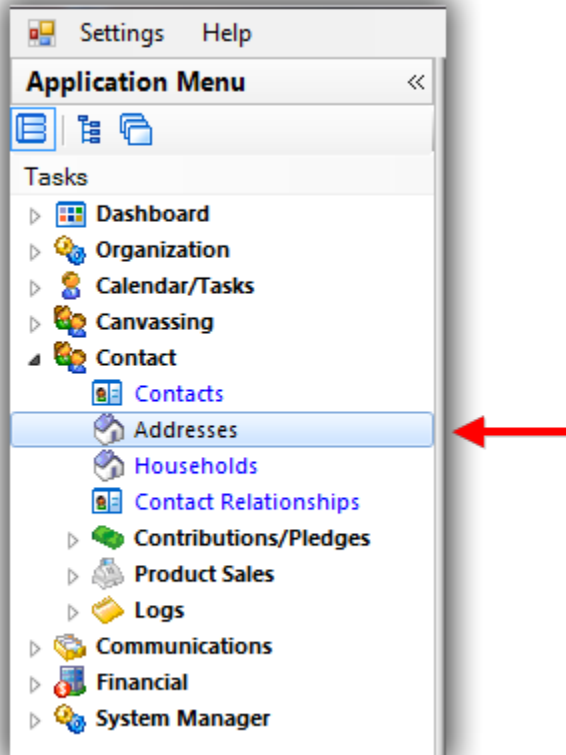
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Steps to Conform Address Records En Masse

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

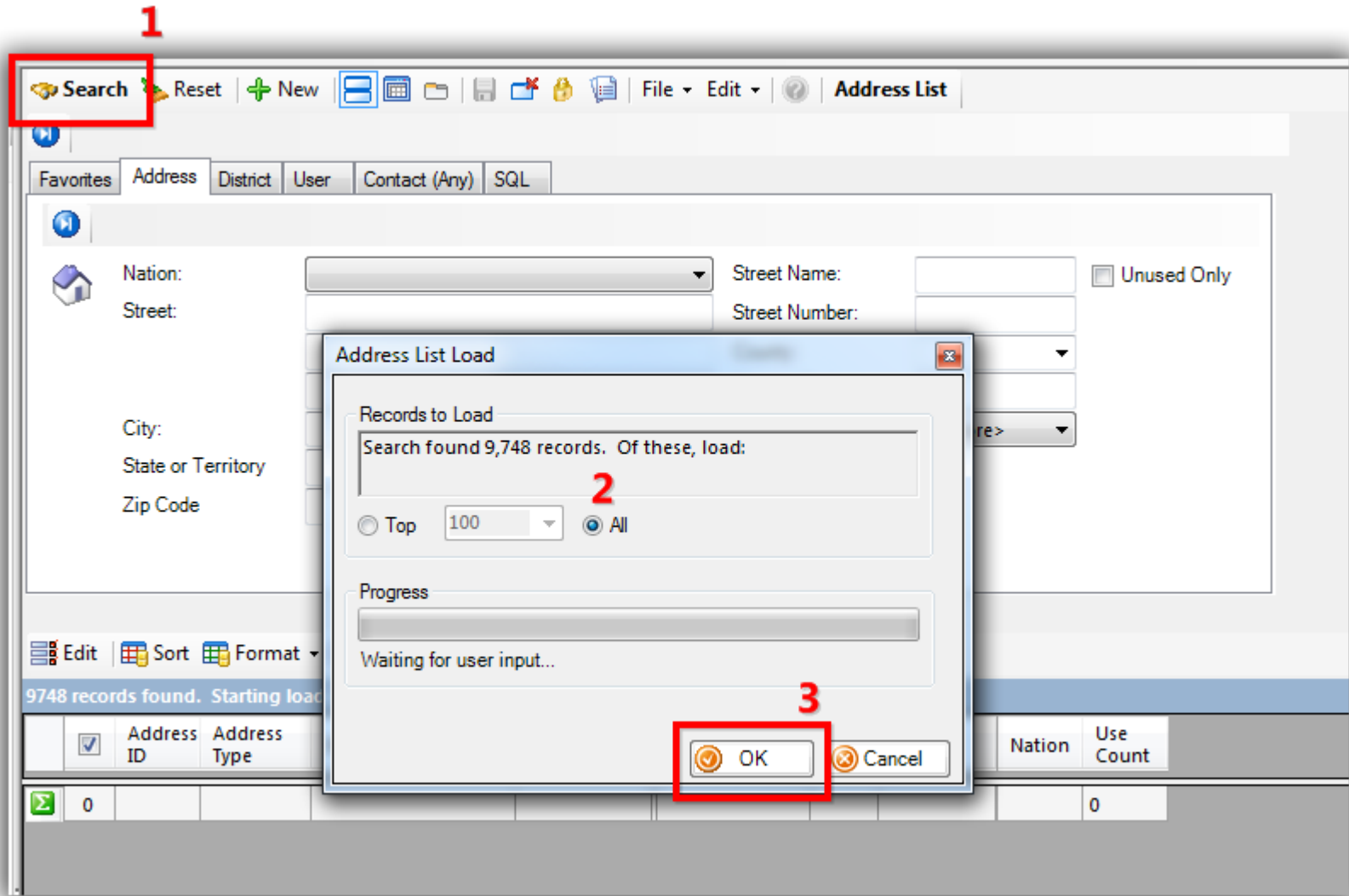
Navigate to the **Addresses** list under the **Application Menu**.

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

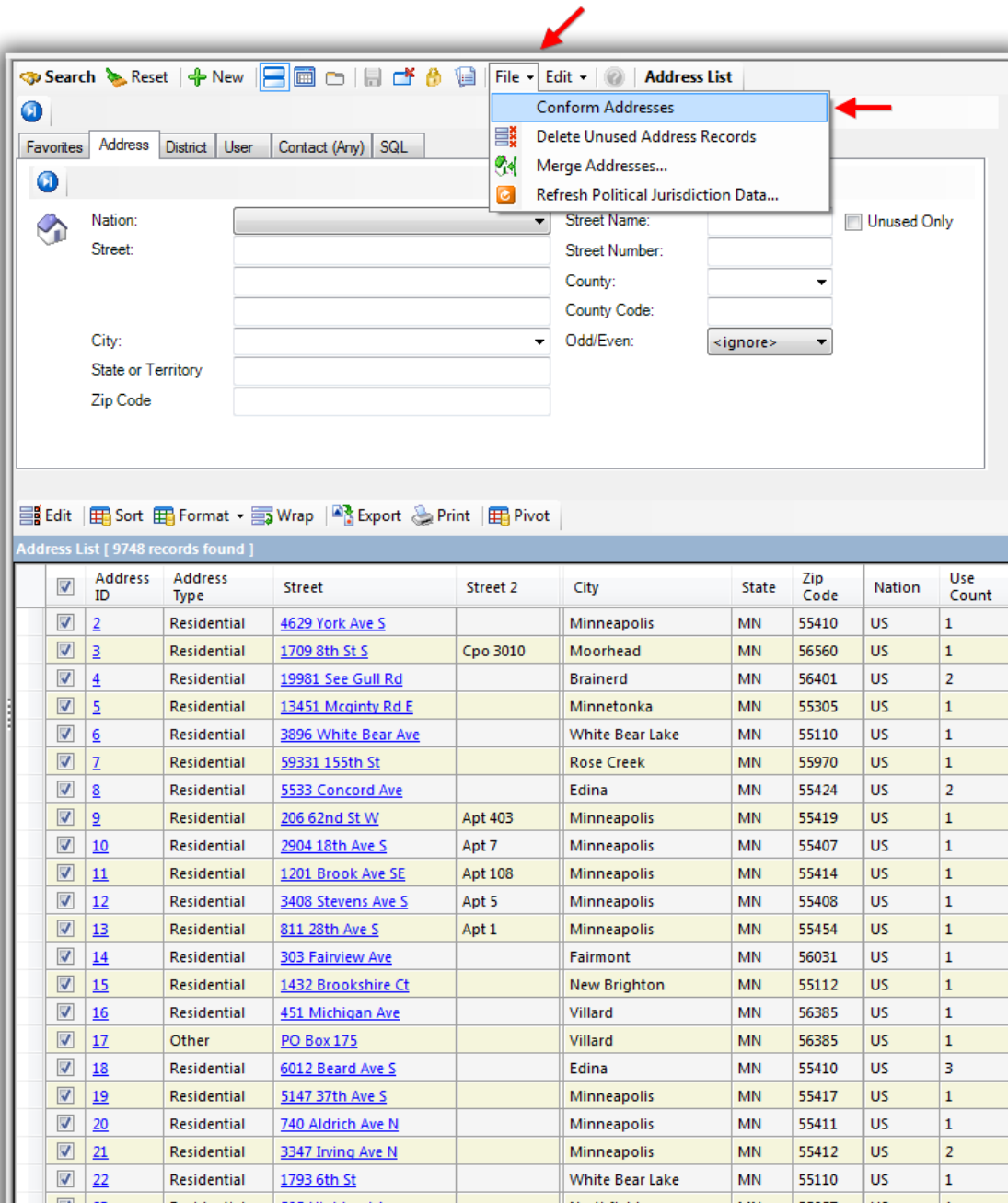
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Select **File > Conform Addresses.**

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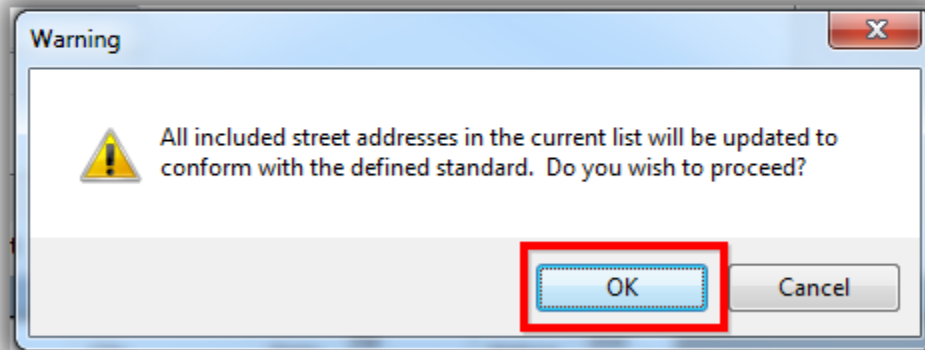
The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with 'File', 'Edit', and 'Address List'. The 'File' menu is open, and the 'Conform Addresses' option is highlighted. A red arrow points to the 'File' menu, and another red arrow points to the 'Conform Addresses' option. Below the menu, there are several input fields for address details: Nation, Street, City, State or Territory, Zip Code, Street Name, Street Number, County, County Code, and Odd/Even. A 'Unused Only' checkbox is also present. At the bottom, there is a table titled 'Address List [9748 records found]' with columns for Address ID, Address Type, Street, Street 2, City, State, Zip Code, Nation, and Use Count. The table contains 22 rows of address records.

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		Minnnetonka	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

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

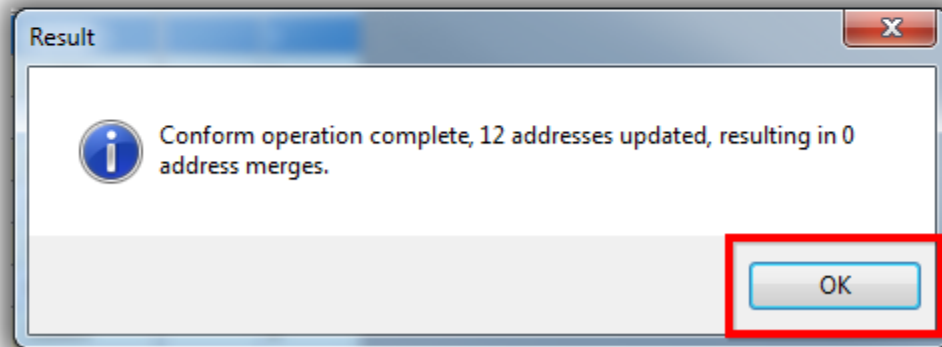
Click [OK] to proceed. Make 100% sure with your team that this is something you want to do prior to running the operation.




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

You'll get a popup notification with the results. Click [OK] to finish.

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.

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Trail Blazer™

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

Related Resources

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

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](#)

Trail Blazer Live Support

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☎ **Phone:** 1-866-909-8700

✉ **Email:** support@trailblz.com

📘 **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

🐦 **Twitter:** <https://twitter.com/trailblazersoft>

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** This service is included in your contract.*