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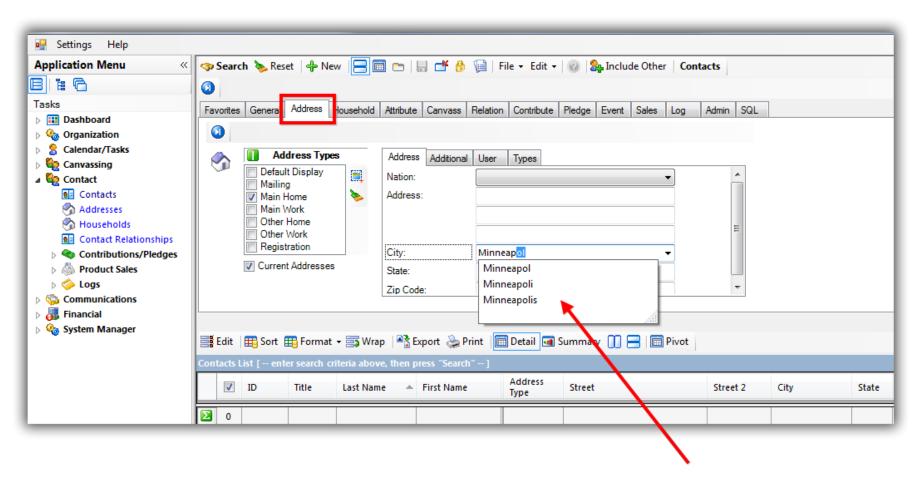
#### **Overview**

This article provides a quick walk-through on 'normalizing' addresses in your database so that slight misspellings are cleaned up en masse.

Databases can get messy from time-to-time especially if there is a lot of activity taking place – instead of going one-by-one to clean up your address records, this article shows how to fix it with a mass update.

**Scenario:** as users enter data into the system or people come into your database through an <u>online donation</u> or <u>event sign-up</u> it's possible that one of the address fields was entered slightly wrong e.g. city. This will cause the drop-downs in the database to contain inconsistent data. The example below shows the city **Minneapolis** spelt three different ways when only one of the ways is correct:





Example of a city that should be consistent but as data was entered slightly different it adds incorrect spellings to the drop-down in the database.

In this example alling the cities should read 'Minneapolis' but only one is correct.

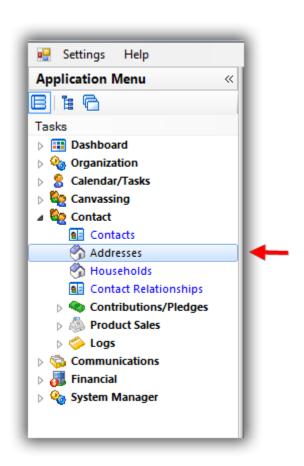


**Tip:** After you clean-up the misspelled data in your drop-downs, you further cleanup your database by <u>conforming addresses</u> en masse as well as merging duplicate address data.

#### **Steps**

Open the Addresses list.



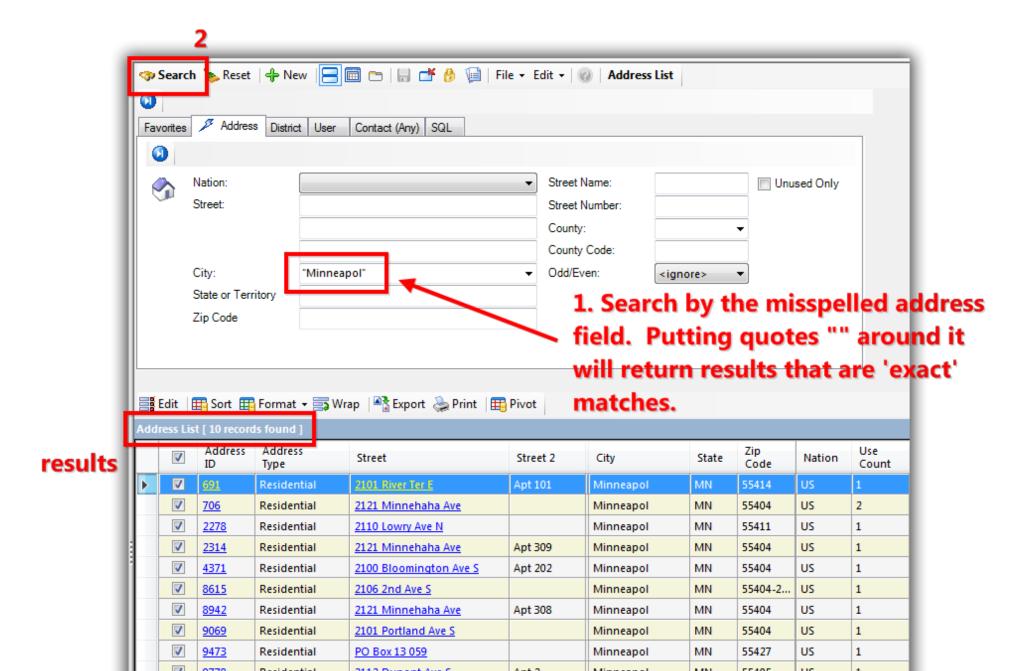


Run a <u>search query</u> by the **misspelled address field** i.e. City, State, Country, Street, Zipcode, etc. *In my example I searched for the city "Minneapol"* which should be Minneapolis which produced 10 results.

**Tip:** if you put quotes "" around the word it will only return **exact** matches which in this example was important.



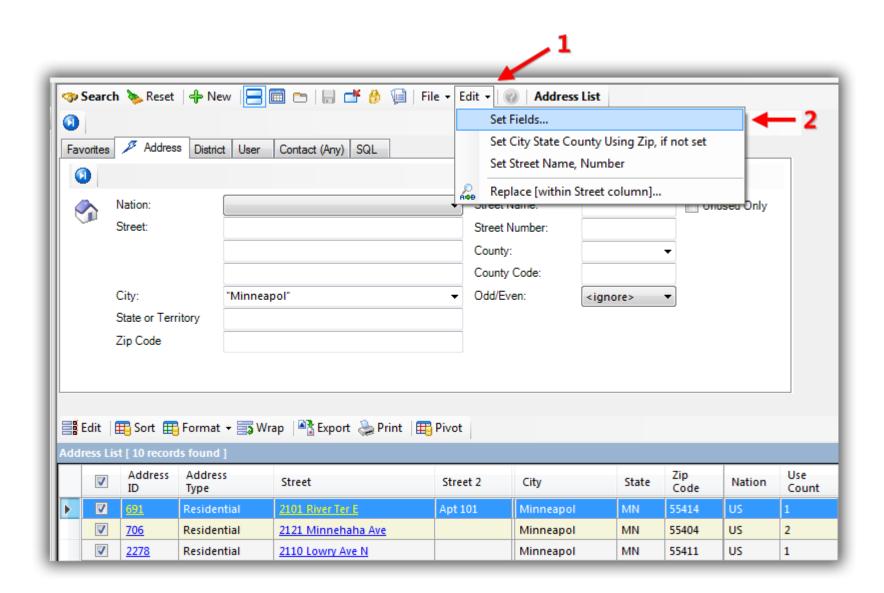






Click the **Edit** drop-down at the top of the screen and select **Set Fields...**.



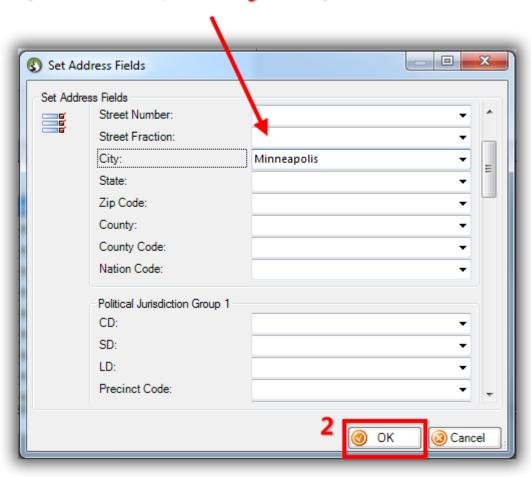




Scroll down to the **field** in the list that is **misspelled**. Enter the correct spelling and click **[OK]**. In my example it was the City field.

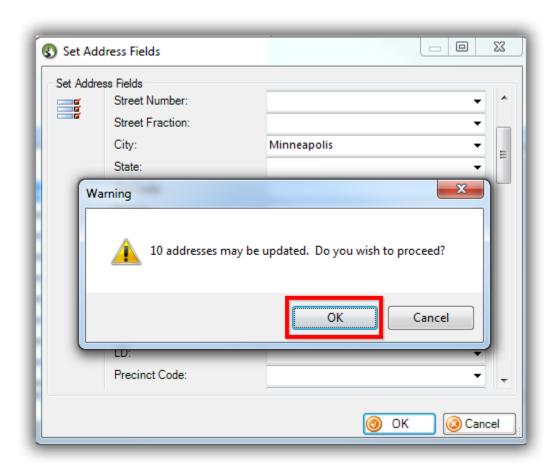


## 1. Type in the correct spelling for the misspelled field (in this case, the city field).



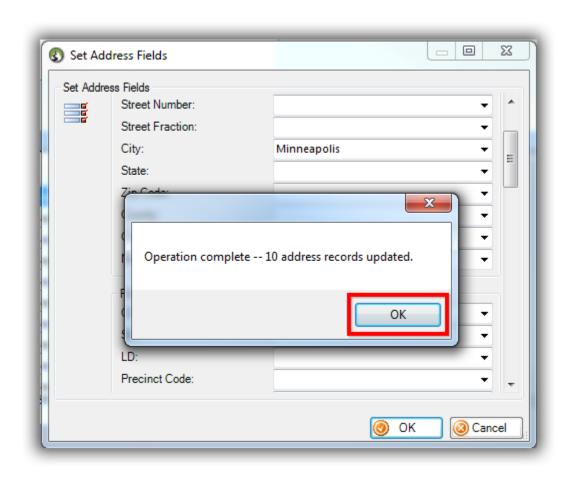


Double-check that everything is correct and click [OK].



You'll get a prompt when the process is finished. Click [OK] to proceed.

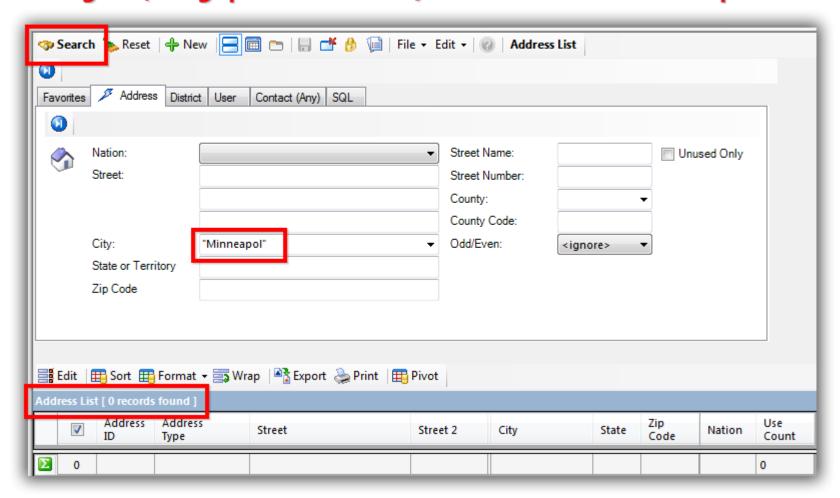




Run another search in the **Address** list by the **same misspelled field** (using quotes around it) and the results should equal **zero**. *My example is below.* 



## Once the update has been made you can search by the misspelled field again (using quotes around it) and the results should equal zero.

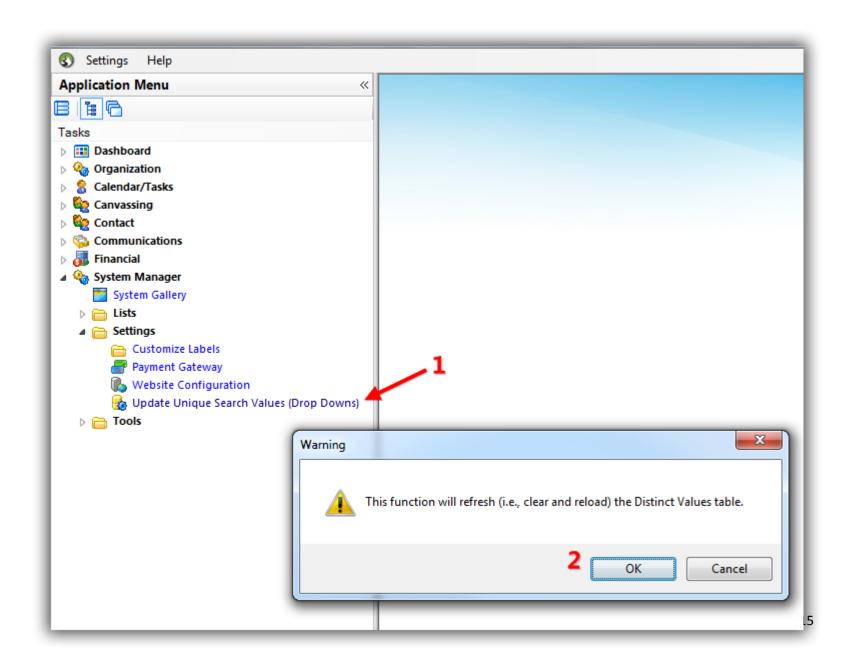




**Repeat** these steps until **all** the misspellings have been corrected.

Once you're finished you'll need to refresh the values in the drop-down menus. Navigate to **Application Menu > System Manager > Settings > Update Unique Search Values (Drop Downs)** and click **[OK]**.

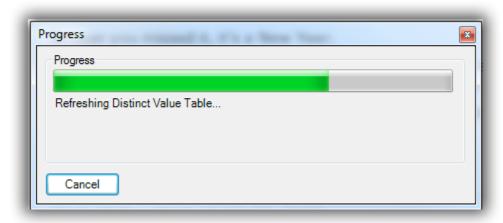






If you have a large database and/or you haven't done this in a while it may take 15+ minutes for the process to complete.

If you have a large database (100k+) contacts and you haven't done this in awhile, it may take some time for this process to complete.



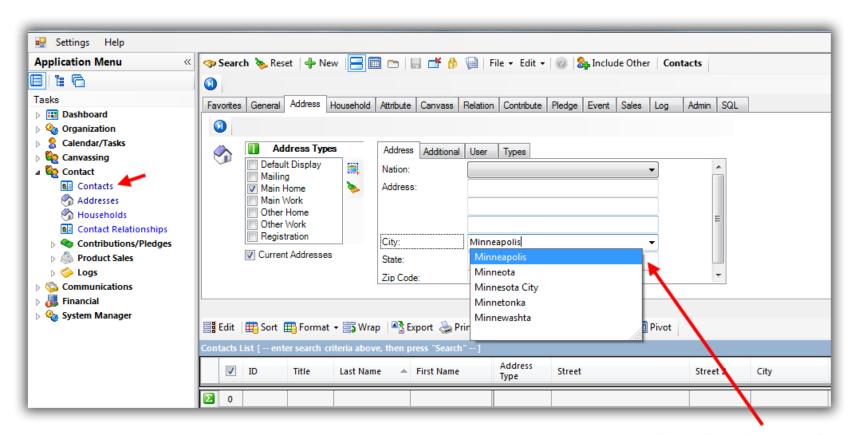
Click [OK] once the process is finished.





Navigate back to the **Contacts (Voters/Donors)** list and **verify** that your **drop-downs** are cleaned up (*if it's not a field that's a drop-down you can verify by <u>formatting</u> the column into the grid). In my example the 2 misspelled cities for 'Minneapolis' have been cleaned and now the correctly spelled one is all that remains.* 





After cleaning up the address misspellings the incorrect options will no longer populate in the drop-down.

The **related resources** below link to a wide variety of other useful articles and videos related to **cleaning up** your database.





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



#### **Related Resources**

**Article:** Automatically Conform Addresses

Article: <u>Auto-Merging Duplicate Address Records</u>
Article: <u>Unable to Make A Change to an Address</u>

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

<u>Updated Voter Data For)</u>

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: How to Print Mail-Merge Address Labels

**Article:** Printing Envelopes

Article: Rollback – Undo Function – Also, Tips on Viewing the Activity for Changes to a Specific Field (Requires Admin Access)

Video: Updating or Changing Data in a Field for all or Some of Your Records

Video: Households – What To Do B4 Householding!!

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\* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>Click here</u> to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

- \* After registering you'll receive a confirmation email with the instructions for how to log into the <u>GoToMeeting</u> session where we host our live interactive trainings.
- \* This service is included in your contract.