



Cleaning and Managing Your Data in NeonCRM

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Agenda/Glossary

1. Finding bad data in your NeonCRM system
2. Cleaning bad data in Excel (or Google Sheets)
3. Batch Updating account data in NeonCRM
4. Reporting tips
5. Advanced Excel tools for managing data



What is bad data?

1. Inconsistent
2. Incomplete
3. Inaccurate



Cleaning bad data in Excel & Google Sheets



Cleaning bad data in Excel

=PROPER(...)

"GLENN SMITH" → "Glenn Smith"

=TRIM(...)

" Joann Lee " → "Joann Lee"

= "ABC" & "XYZ" / =CONCATENATE("ABC", "XYZ")

"Mr." | "Jones" → "Mr. Jones"



Cleaning bad data in Excel

Find-Replace



Batch Update in NeonCRM



Reporting Tips



Advanced Excel Tools



Advanced Excel Tools

Text-to-columns



How to find a line break

Ctrl + J



Advanced Excel Tools

“IF” Statements



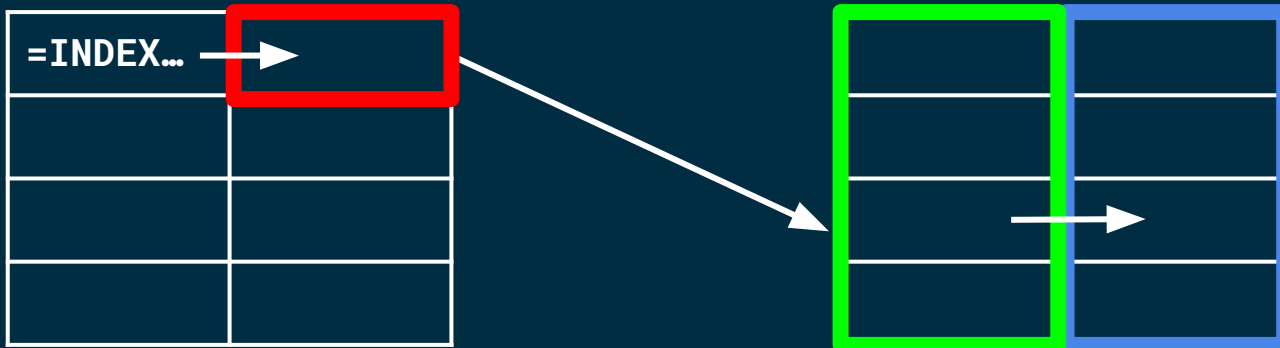
Advanced Excel Tools

INDEX-MATCH



Syntax:

= INDEX(*Column to look up* , MATCH(*Reference cell* , *Reference column to match* , 0))

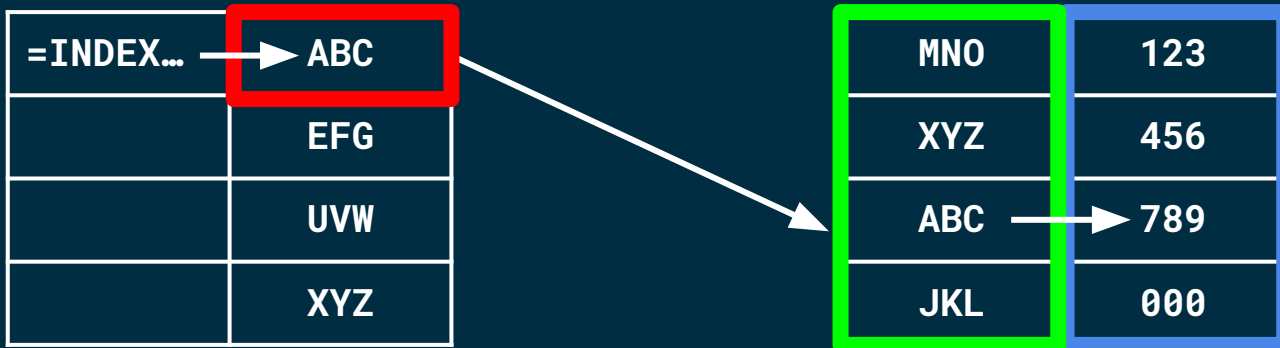




Example:

`=INDEX(Table2!$B:$B, MATCH(B2, Table2!$A:$A, 0))`

`=789`





Other ways to clean/manage data

- 1. Data hygiene services (e.g. Neon's NCOA Update)**
- 2. Bulk Operations in NeonCRM**
- 3. Duplicate Manager in NeonCRM**



Questions?