



### **Append comments to records**

For this task, you will want to use the “Append Comments to Records” feature found by clicking on “Add New Records” at the top of any screen. (The File Update Maintenance routine would not be appropriate since it would overwrite the existing comments). Note that the only thing the append comments function does is to append the comments from your file to the record that you match it up to, as defined by the use of key fields.

### **Defining key(s)**

During the append comments process, you have to define the “key(s)” that you want to use to define a “match.” This is what will determine which record the comments are added to. It appears that you would be using the company field to define which record the comments should be added to. Note that using the company name, as opposed to something that is actually unique, like the record number, creates more challenges.

### **Multiple records for one company in your append file**

In your file, there should be only one row with comments to append to any given record. So if you are using the company field to define the match, then multiple records for the same company need to have their comments combined (see “Merge two cells into one” at the end of this document), thus creating a single record for that company. Or you could perform the append process multiple times with multiple spreadsheet, each one having only one instance of a given company.

### **Multiple records for one company in your existing database**

Another issue is if you have multiple records with the same company name in your existing database. If you are only using the Company field for matching and have a record in your file for company = Acme and there is more than one record in the database with company = Acme, then the append comments process will simply select the first instance of that company name that it finds (a fairly random process) and one set of comments for that company from the append file(at random) and append the comments to that record. The comments would not be appended to any other records with that company name. It will also skip any additional comments for that same company in the append file.

### **Additional match criteria**

If the multiple records for one company name actually relate to different records in the database, then you need to ***add additional columns to your file to help you refine the matching process***. For example, if there is one record in your database for Acme in California and another for Acme in Texas, then you would need to add a state column to your append file and list CA for the one row and TX for the other and then when you define your keys, you would choose both company and state.

There are numerous fields you can use for your keys for matching as listed below.

*Background Information [this is the field you match your comments to – it appears highlighted in beige You MUST map your comments to this field]*  
*Call Back Type*



Call Back Start Date  
Call Back Start Time  
Call Back End Date  
Call Back End Time  
Call Back Assign Fname  
Call Back Assign Lname  
Prefix  
F Name  
L Name  
Title  
Phone  
Alt Phone  
Fax  
Email  
Company  
Address 1  
Address 2  
Address 3  
City  
State  
Zip  
County  
PRI\_PHONE3  
SIC\_CODE  
Contract #  
Future Use  
Referring Customer  
Lead #  
Primary Lead Source  
MAPSCO  
Contacted Date  
Grade  
Lead Status  
User\_Field\_6  
Campaign Survey  
Highlight Comments  
Interest1 – 18  
Contact Notes  
Lead Sales Stage  
Direct Marketer  
Contact Method  
ForecastDate  
PROBLTY  
Close Date  
Campaign  
Cell/Mobile

## Merge two cells into one

If you need to merge multiple cells into one, you can use these instructions. While these show an example of merging multiple cells from one row into a new column, the same concept would apply if you wanted to merge multiple cells from different rows, although there would need to be more manual entry of the formulas since you would pick one record to be your master, then would merge the comment cells from one or more additional records into a new column of full comments for the master record. Then you would delete the additional records from the file before your import.

1. Add another column to the right of the two you want to merge

G	H	I
Phone Area Code	Phone Number	Combined Phone
732	5579210	
917	3289255	
503	744-2200	

2. Click on the 1<sup>st</sup> cell in the added column to highlight it

G	H	I
Phone Area Code	Phone Number	Combined Phone
732	5579210	
917	3289255	
503	744-2200	

3. Type the following formula in the highlighted cell above:  
**=G2&" "&H2**

The screenshot shows a Microsoft Excel spreadsheet with the following data:

	D	E	F	G	H	I	J
1	PRIJOB	Zip/Postal	Country	Phone Area Code	Phone Number	Combined Phone	Email
2	54	08753	US	732	5579210	=G2&" "&H2	mmcgo
3	MARKETIN	10003-363	US	917	3289255		ricwilm
4	55	97035	US	503	744-2200		bjvega6

The formula bar shows the formula: `=G2&" "&H2`

4. Click Enter/Return and the value in cell G2 and cell H2 will be merged into cell I2

# LEADMASTER

	D	E	F	G	H	I	J
1	PRIJOB	Zip/Postal	Country	Phone Area Code	Phone Number	Combined Phone	Email
2	54	08753	US	732	5579210	732 5579210	mmcg
3	MARKETIN	10003-363	US	917	3289255		ricwilr
4	55	97035	US	503	744-2200		bjvege

- Now highlight the combined cell I2 and “drag” the lower right-hand corner of the highlight box down so that it populates the values in the rest of the cells in column I

	D	E	F	G	H	I	J
1	PRIJOB	Zip/Postal	Country	Phone Area Code	Phone Number	Combined Phone	Email
2	54	08753	US	732	5579210	732 5579210	mmcgovern
3	MARKETIN	10003-363	US	917	3289255	917 3289255	ricwilmer@
4	55	97035	US	503	744-2200	503 744-2200	bjvega69@
5	FINANCE/	02145	US	617	629-3333	617 629-3333	pamajane@
6	55	60015	US	847	964-2787	847 964-2787	jfreres@m
7	DEPARTM	19034	US	215	6468000	215 6468000	robertg@fe

Note the “ “ marks in the formula above denote a space. You could put a dash “-“ in there by using the following formula:

**=G2&"-"&H2**