Worst Spreadsheet Mistakes New Move Managers Make

(Creating Spreadsheets That Are Easy To Import Into Software Packages)

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Introduction

When you build a spreadsheet, you may want to think ahead about the possibility of importing your information into a software package at some point in the future. The time to plan your spreadsheet is at the beginning, before time passes and you have added hundreds of entries.

Below are some considerations for best practices in your spreadsheet, so that your data can be easily imported into a software package when the time comes.

The 10 items below each show you a situation we feel is a risk of making you manually reformat data before popular software packages will be able to deal with the data. In each case we also show how you can structure the data in a way more easily imported.

The grey highlighting in each shows the focus of the example.

1) **Almost always bad**: Having the data for one client (or vendor, etc) spread across multiple rows.

Safe: Having all the data for a given client (or vendor, etc) in one row. Computers like one row per record.

Vendor Name	First Name	Last Name	Phone number	Address			
Harmony Senior Living	Bridgette	Nelson	(123) 123-1234 (cell)				
			(123) 123-4321 (office)				✗
Maritime Senior Living	Elaine	Rogers	(123) 456-5432 (office				

Vendor Name	First Name	Last Name	Phone number 1	Phone 1 Descr	Phone number 2	Phone 2 Descr	Address
Harmony Senior Living	Bridgette	Nelson	(123) 123-1234	Cell	(123) 123-4321	Office	
Maritime Senior Living	Elaine	Rogers					✓

2) **Risky**: Having the person's first and last name in the same cell.

What if there are three names? Sometimes people have a compound first name, 'Mary Jane Smith', and sometimes they have a compound last name, like 'Tammy Thomas Halston'. What are the odds that a computer can split those up into first and last names correctly?

If you want to send out automated emails, you may wind up starting the email "Hi Tammy Thomas" (from the example below).

Safe: Having separate columns for first name, last name.

Vendor Name	Name	Phone number	Address		
Harmony Senior Living	Mary Jane Smith	(123) 123-1234 Office			
Maritime Senior Living	Tammy Thomas Halston	(123) 123-4321 (office)			

Vendor Name	First Name	Last Name	Phone number	Phone Number Desc	Address
Harmony Senior Living	Mary Jane	Smith	(123) 123-1234	Office	
Maritime Senior Living	Tammy	Thomas Halston	(123) 123-4321	Office	

3) **Risky**: Having the person's honorific in the same cell as their name (like Ms., Mrs., Mr., Dr.).

Safe: Having a separate column for the honorific.

Vendor Name	Name	Phone number	Address	
Harmony Senior Living	Ms. Bridgette Nelson	(123) 123-1234 Office		

Vendor Name	Honorific	First Name	Last Name	Phone number	Address
Harmony Senior Living	Ms.	Bridgette	Nelson	(123) 123-1234	

4) **Risky**: Having the person's title in the same cell as their name.

Safe: Having separate columns for first name, last name, and title.

Vendor Name	Name		Phone number	Address	
Harmony Senior Living	Bridgette Nelson, Executive Director		(123) 123-1234		✗

Vendor Name	First Name	Last Name	Title	Phone number	Address	
Harmony Senior Living	Bridgette	Nelson	Executive Director	(123) 123-1234		✓

5) **Very Risky**: Multiple phone numbers in one cell, along with labels for each of them.

When using software on a phone, some packages may let you dial a phone number by touching on it. This may not work if the phone number is actually a combination of two or more numbers, or has labels mixed in.

Safe: Having each phone number in its own column, with a separate column for a label for that phone number (like 'office' or 'cell').

Vendor Name	First Name	Last Name	Phone number	Address	
Harmony Senior	Bridgette	Nelson	(123) 123-1234 Office (123) 123-4567 Cell		✗

Vendor Name	First Name	Last Name	Phone number 1	Phone 1 Descr	Phone number 2	Phone 2 Descr	Address	
Harmony Senior	Bridgette	Nelson	(123) 123-1234	Office	(123) 123-4567	Cell		✓

6) **Risky**: Multiple email addresses in one cell.

Safer: Having as many 'Email' columns as needed so as to keep each email in its own cell.

Vendor Name	First Name	Last Name	Email	Address	
Harmony Senior Living	Bridgette	Nelson	bridgette@harmonysenior.com info@harmonysenior.com		✗

Vendor Name	First Name	Last Name	Email 1	Email 2	Address	
Harmony Senior Living	Bridgette	Nelson	bridgette@harmonysenior.com	info@harmonysenior.com		✓

7) **Risky**: Having the whole address in one cell.

What if at some point you want to know which cities or zip codes most of your business comes from? So you want to sort your data based on what city someone is in? If the city and zip code and the rest are all mixed into one cell, how can the computer do that?

Safe: Having separate columns for street, apartment, city, state, zip, country

Vendor Name	First Name	Last Name	Phone number	Address		
Harmony Senior Living	Bridgette	Nelson	(123) 123-1234 (cell)	333 4th St Apt G, Oak Park, IL 60302	✗	

Vendor Name	First Name	Last Name	Phone number 1	Phone 1 Descr	Street	Apt	City	State	Zip
Harmony Senior Living	Bridgette	Nelson	(123) 123-1234	Office	333 4th St.	Apt G	Oak Park	IL	60302

8) **Risky**: If you divide the list into 'territories', having the occasional row that is the territory label.

Safe: Having a column labelled 'territory', and each row has a label (like 'The Southtowns'). The label does get duplicated, but this approach is easily digestible by computers.

North Towns

Name	First Name	Last Name	Phone	Email
Hamilton Living	xxxx	xxxx	(xxx) xxx-xxxx	xxx@xxx.com
Shady Brook Center	xxxx	xxxx	(xxx) xxx-xxxx	xxx@xxx.com
Martin House	xxxx	xxxx	(xxx) xxx-xxxx	xxx@xxx.com

South Towns

Name	First Name	Last Name	Phone	Email
Oakmont Care Facility	xxxx	xxxx	(xxx) xxx-xxxx	xxx@xxx.com
Remington Homes	xxxx	xxxx	(xxx) xxx-xxxx	xxx@xxx.com
Caring Hands Living	xxxx	xxxx	(xxx) xxx-xxxx	xxx@xxx.com

✗

✓

Name	Territory	First Name	Last Name	Phone	Email
Hamilton Living	North Towns	xxxx	xxxx	(xxx) xxx-xxxx	xxx@xxx.com
Shady Brook Center	North Towns	xxxx	xxxx	(xxx) xxx-xxxx	xxx@xxx.com
Martin House	North Towns	xxxx	xxxx	(xxx) xxx-xxxx	xxx@xxx.com
Oakmont Care Facility	South Towns	xxxx	xxxx	(xxx) xxx-xxxx	xxx@xxx.com
Remington Homes	South Towns	xxxx	xxxx	(xxx) xxx-xxxx	xxx@xxx.com
Caring Hands Living	South Towns	xxxx	xxxx	(xxx) xxx-xxxx	xxx@xxx.com

9) **Risky**: Having a business name and a business category label in the same cell (example: 'Johnson and Assoc, Attorneys').

Safe: Putting the business category in its own column.

Vendor Name	First Name	Last Name	Phone number	Address
Johnson and Assoc, Attorneys	Bridgette	Nelson	(123) 123-1234 (cell)	333 4th St Apt G, Oak Park, IL 60302

Vendor Name	Biz Type	First Name	Last Name	Phone number	Address
Johnson and Assoc	Attorneys	Bridgette	Nelson	(123) 123-1234	

10) **Risky**: Mixing your clients and your vendors in one list.

Safe: Having a 'type' column with a label like 'client' or 'vendor'.

Clients			
Name	Phone	Email	Address
Martha Johnson	(xxx) xxx-xxxx	xxx@xxx.com	
Sherry Kedswick	(xxx) xxx-xxxx	xxx@xxx.com	
Harriot Hartmann	(xxx) xxx-xxxx	xxx@xxx.com	
Vendors			
Name	Phone	Email	
Oakmont Care Facility	(xxx) xxx-xxxx	xxx@xxx.com	
Remington Homes	(xxx) xxx-xxxx	xxx@xxx.com	
Caring Hands Living	(xxx) xxx-xxxx	xxx@xxx.com	

Type	Vendor Name	First Name	Last Name	Phone	Email	Address
Client		Martha	Johnson	(xxx) xxx-xxxx	xxx@xxx.com	
Client		Sherry	Kedswick	(xxx) xxx-xxxx	xxx@xxx.com	
Client		Harriot	Hartmann	(xxx) xxx-xxxx	xxx@xxx.com	
Vendor	Oakmont Care Facility			(xxx) xxx-xxxx	xxx@xxx.com	
Vendor	Remington Homes			(xxx) xxx-xxxx	xxx@xxx.com	
Vendor	Caring Hands Living			(xxx) xxx-xxxx	xxx@xxx.com	

If you want to plan your spreadsheet for easy import later into a software package, we hope this document helps you create one that won't require reformatting a lot of data.

Thanks.

- Brian Jacobs