



Excel Quick Tips

CREATING USERNAMES

For SmartHQ, when you want to upload users in masse for an upcoming market or for a new wave of employees at the market.

As an example:

Username that will be using their first initial and last name.

```
=CONCATENATE(LEFT(A12,1),B12)
```

This combines two Excel functions, Concatenate and Left. Concatenate combines cells together and Left allows you to take data from a cell to the left of the cell you are inputting the data into, you could also use the Right function for the same purpose.

CHECKING FOR DUPLICATES

Home > Conditional Formatting > Highlight Cells Rules > Duplicate Values

Checking for duplicates allows you to see if someone created multiple accounts and adjust the accounts accordingly.

Example.

| FirstName | LastName | AccountPin | BeginningBalance |
|-----------|----------|------------|------------------|
| John | Doe | 1234 | 2.00 |
| John | Doe | 1234 | 2.00 |
| John | Doe | 1234 | 2.00 |
| John | Doe | 1234 | 2.00 |
| John | Doe | 1234 | 2.00 |
| John | Doe | 1234 | 2.00 |
| John | Doe | 1234 | 2.00 |

CHECKING FOR SPECIAL CHARACTERS

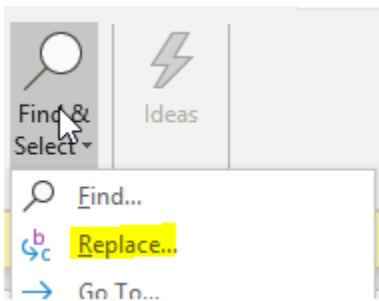
Our systems don't allow special characters to be uploaded, so it is best to remove them prior to upload. The usual special characters that we observe are: space, single quote, ampersand, comma and Asterisk.

You can check for special characters through the use of the Find and Replace function. Hold Control then click F and this will bring up the function. Select "Replace" and go throughout the above special character to assist with uploading your documents.

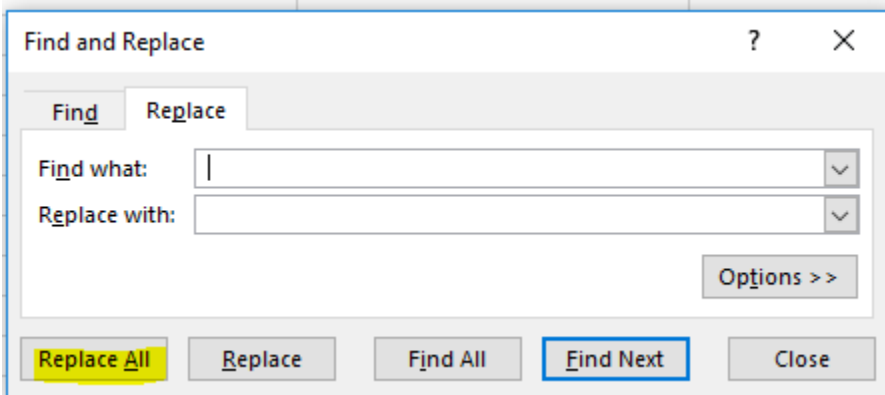
REMOVING SPACES IN USERNAME, FIRSTNAME, LASTNAME FIELDS

SmartHQ will not upload user information if there are spaces in the UserName, FirstName or LastName fields. This can be easily remedied by doing the following:

Click on "Find & Select" and choose Replace:



In the Find and Replace box, type a space in the "Find what:" field, and leave the "Replace with:" completely empty, then click Replace All:



This will remove any spaces between valid characters.