Chris Brasher
MBA 615

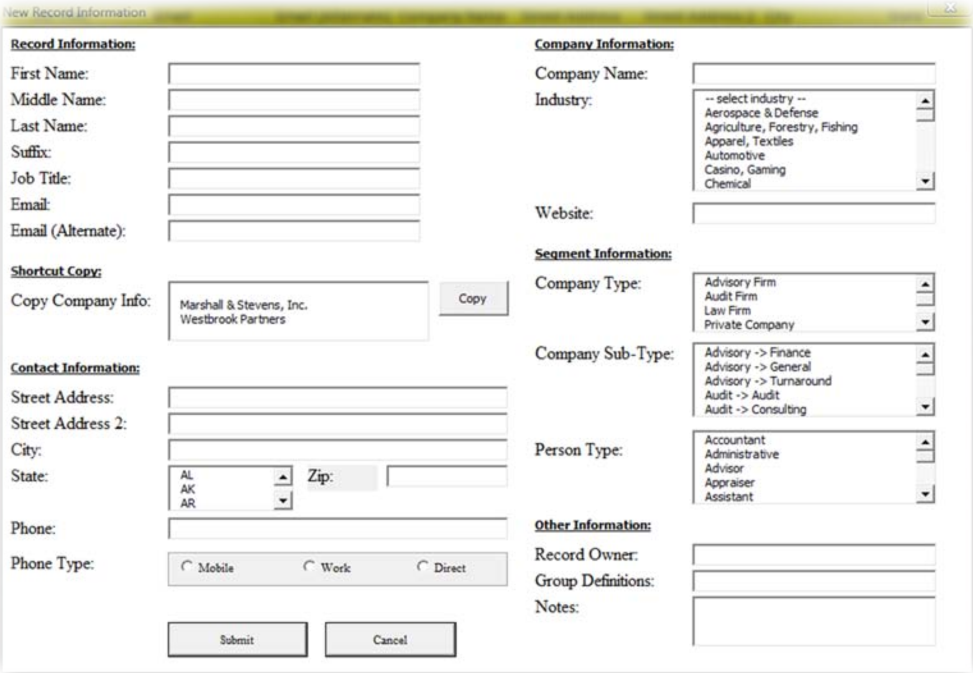
VBA Project Final

Situation

At the start of my internship, I had the daunting task of purging through 50,000 person records and 30,000 company records to add into the brand new CRM database. This consisted of removing duplicates, separating cells using text to columns, switch “dirty” records that had first and last name swapped, and fix company names that were only a couple characters different (ie. “ABC Company, LLC” is different than “ABC Company LLC”). Now that the data is inside the system, we have had a tough time segmenting the data according to the fields we implemented recently. Thus, I wanted to develop a file that the data entry personnel could use to format correct, “clean”, segmented records before they are loaded into the CRM.

Solution

1. The user would open this file when collecting data from business cards, searching the web, or by telemarketing.
2. User would Click “Start Here”
    a. Immediately the system loads the Listbox Tables and Company records that already exist in the database.



New Record Information

Record Information:

First Name:
Middle Name:
Last Name:
Suffix:
Job Title:
Email:
Email (Alternate):

Shortcut Copy:

Copy Company Info: Marshall & Stevens, Inc.
Westbrook Partners

Contact Information:

Street Address:
Street Address 2:
City:
State: AL, AK, AR
Zip:
Phone:
Phone Type: ○ Mobile ○ Work ○ Direct

Company Information:

Company Name:
Industry: -- select industry --, Aerospace & Defense, Agriculture, Forestry, Fishing, Apparel, Textiles, Automotive, Casino, Gaming, Chemical
Website:

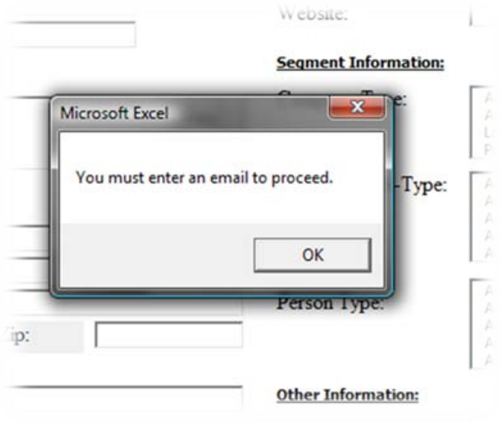
Segment Information:

Company Type: Advisory Firm, Audit Firm, Law Firm, Private Company
Company Sub-Type: Advisory -> Finance, Advisory -> General, Advisory -> Turnaround, Audit -> Audit, Audit -> Consulting
Person Type: Accountant, Administrative, Advisor, Appraiser, Assistant

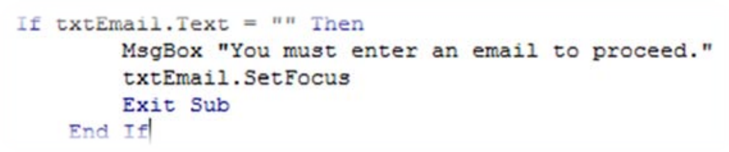
Other Information:

Record Owner:
Group Definitions:
Notes:

3. The user would then enter the information as displayed. Simple data validation exists only on the Email Box.



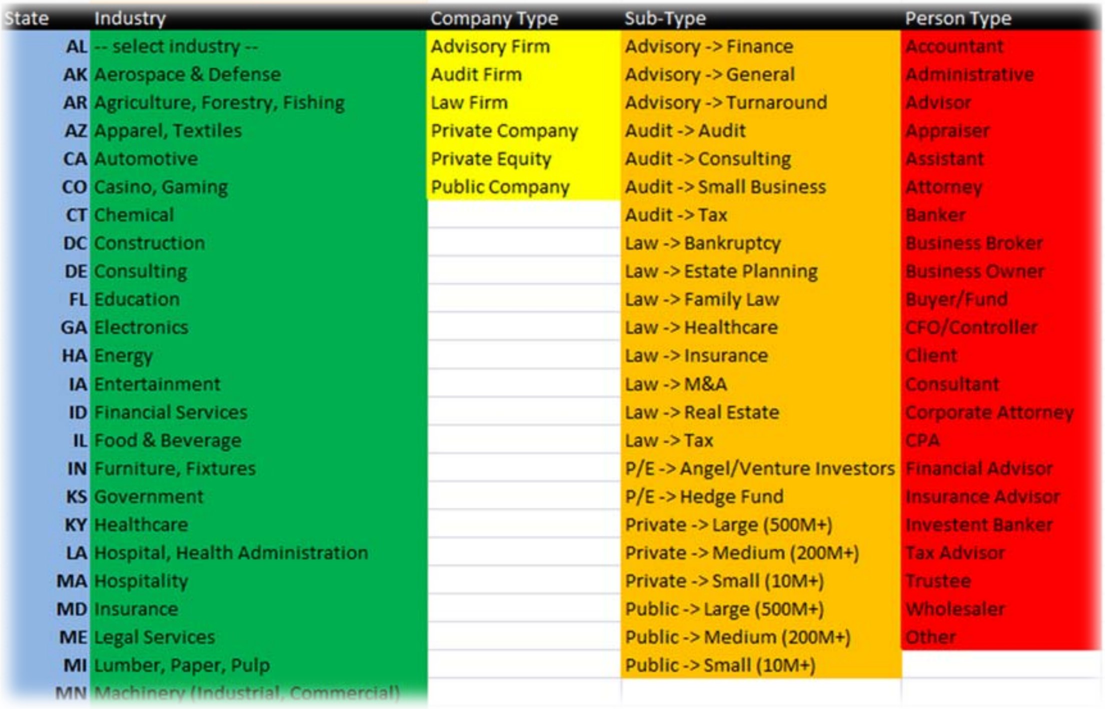
You must enter an email to proceed.



```
If txtEmail.Text = "" Then
        MsgBox "You must enter an email to proceed."
        txtEmail.SetFocus
        Exit Sub
    End If
```

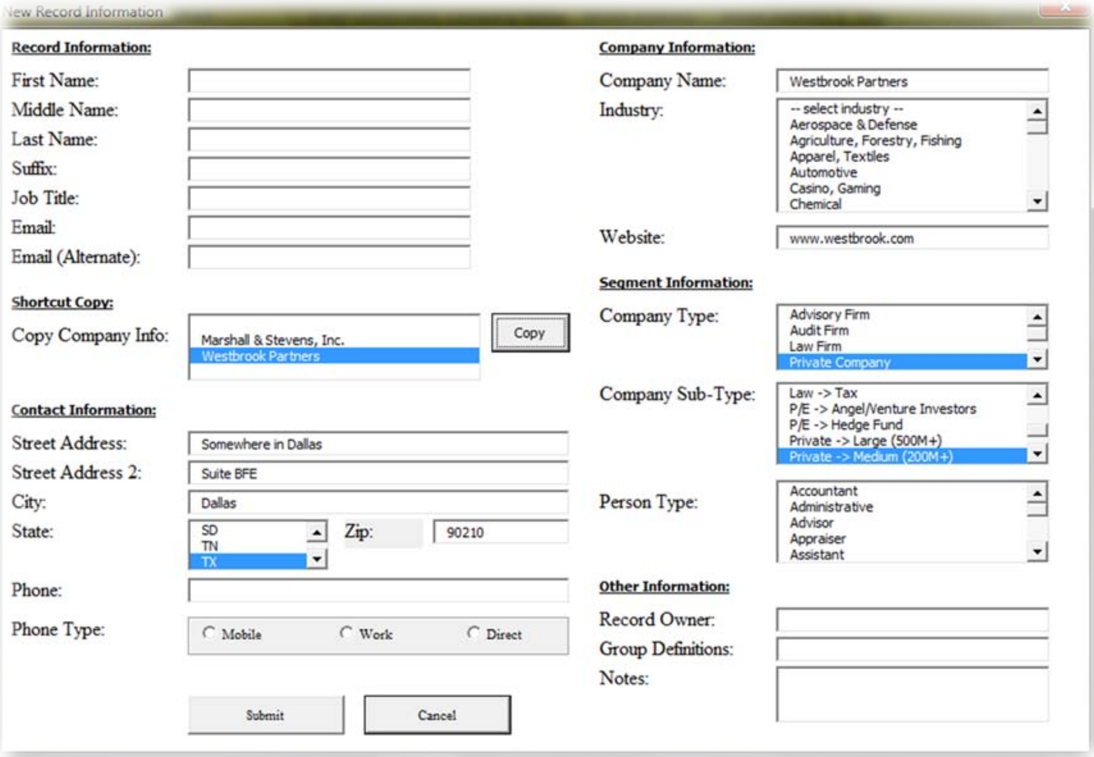
a. If the Email doesn't exist the msg box is displayed and then the cursor focuses on the email box.

4. Each of the listboxes are created from dynamic tables that exist within the "Tables" sheet.
   a. This allows the user to add more data into these tables without shifting through the code.



State	Industry	Company Type	Sub-Type	Person Type
AL	-- select industry --	Advisory Firm	Advisory -> Finance	Accountant
AK	Aerospace & Defense	Audit Firm	Advisory -> General	Administrative
AR	Agriculture, Forestry, Fishing	Law Firm	Advisory -> Turnaround	Advisor
AZ	Apparel, Textiles	Private Company	Audit -> Audit	Appraiser
CA	Automotive	Private Equity	Audit -> Consulting	Assistant
CO	Casino, Gaming	Public Company	Audit -> Small Business	Attorney
CT	Chemical		Audit -> Tax	Banker
DC	Construction		Law -> Bankruptcy	Business Broker
DE	Consulting		Law -> Estate Planning	Business Owner
FL	Education		Law -> Family Law	Buyer/Fund
GA	Electronics		Law -> Healthcare	CFO/Controller
HA	Energy		Law -> Insurance	Client
IA	Entertainment		Law -> M&A	Consultant
ID	Financial Services		Law -> Real Estate	Corporate Attorney
IL	Food & Beverage		Law -> Tax	CPA
IN	Furniture, Fixtures		P/E -> Angel/Venture Investors	Financial Advisor
KS	Government		P/E -> Hedge Fund	Insurance Advisor
KY	Healthcare		Private -> Large (500M+)	Investent Banker
LA	Hospital, Health Administration		Private -> Medium (200M+)	Tax Advisor
MA	Hospitality		Private -> Small (10M+)	Trustee
MD	Insurance		Public -> Large (500M+)	Wholesaler
ME	Legal Services		Public -> Medium (200M+)	Other
MI	Lumber, Paper, Pulp		Public -> Small (10M+)	
MN	Machinery (Industrial, Commercial)			

5. In order to speed up the process the quickest, I added a Company ListBox that displays all the companies inside the database along with a copy button.
    a. The Listbox only displays unique values and ignores any duplicates.
    b. Allows the user to Copy the Street Addrees, City, State, Zip, Company Name, Company Type, Sub-Type, and Website so that the user doesn't have to enter this information multiple times for the same company.
    c. Shows the Company Names in alphabetical order for easier navigation.



Record Information:

First Name:
Middle Name:
Last Name:
Suffix:
Job Title:
Email:
Email (Alternate):

Shortcut Copy:

Copy Company Info: Marshall & Stevens, Inc. / Westbrook Partners

Contact Information:

Street Address: Somewhere in Dallas
Street Address 2: Suite BFE
City: Dallas
State: SD / TN / TX
Zip: 90210
Phone:
Phone Type: ○ Mobile ○ Work ○ Direct

Company Information:

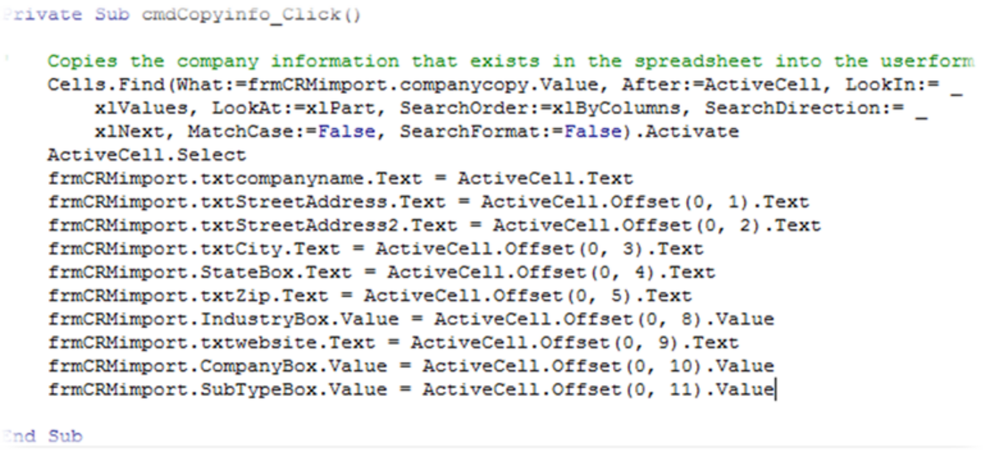
Company Name: Westbrook Partners
Industry: -- select industry -- / Aerospace & Defense / Agriculture, Forestry, Fishing / Apparel, Textiles / Automotive / Casino, Gaming / Chemical
Website: www.westbrook.com

Segment Information:

Company Type: Advisory Firm / Audit Firm / Law Firm / Private Company
Company Sub-Type: Law -> Tax / P/E -> Angel/Venture Investors / P/E -> Hedge Fund / Private -> Large (500M+) / Private -> Medium (200M+)
Person Type: Accountant / Administrative / Advisor / Appraiser / Assistant

Other Information:

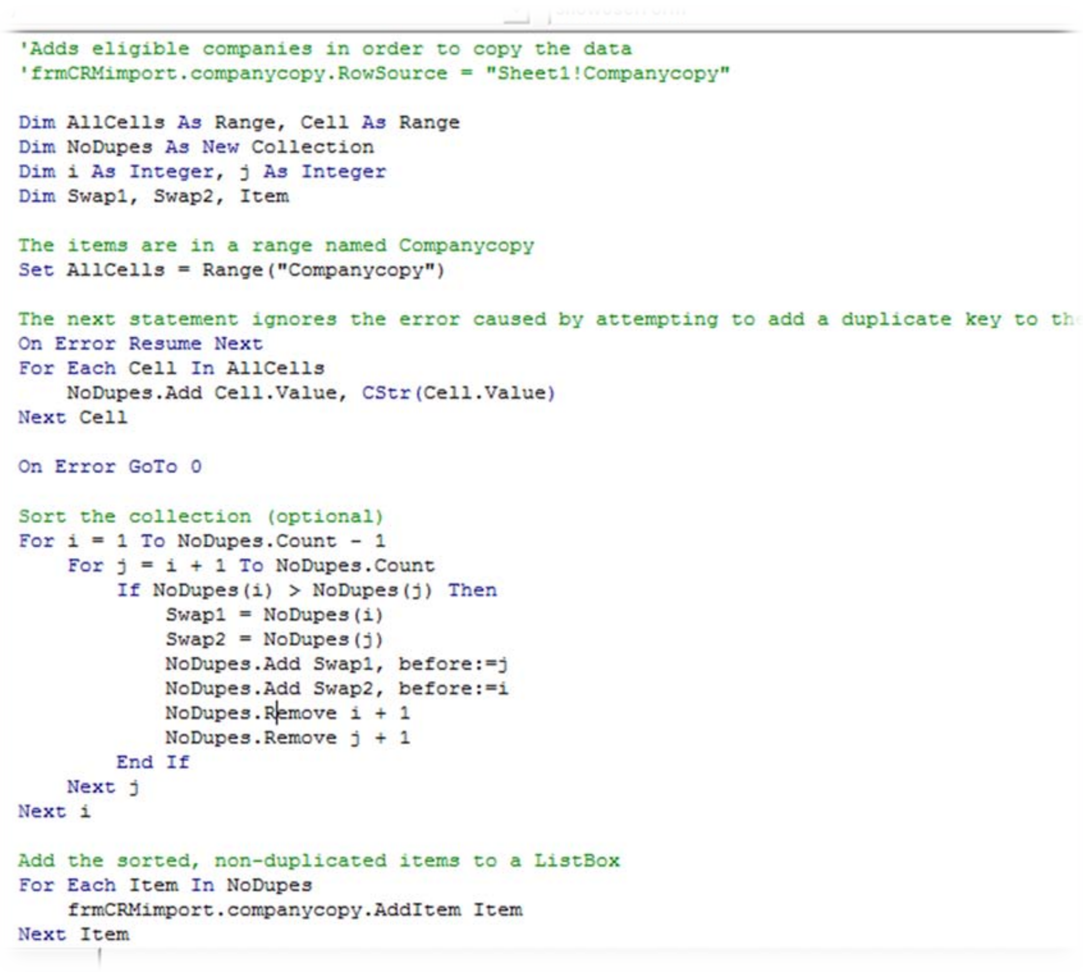
Record Owner:
Group Definitions:
Notes:



```
rivate Sub cmdCopyinfo_Click()

'   Copies the company information that exists in the spreadsheet into the userform
    Cells.Find(What:=frmCRMimport.companycopy.Value, After:=ActiveCell, LookIn:= _
        xlValues, LookAt:=xlPart, SearchOrder:=xlByColumns, SearchDirection:= _
        xlNext, MatchCase:=False, SearchFormat:=False).Activate
    ActiveCell.Select
    frmCRMimport.txtcompanyname.Text = ActiveCell.Text
    frmCRMimport.txtStreetAddress.Text = ActiveCell.Offset(0, 1).Text
    frmCRMimport.txtStreetAddress2.Text = ActiveCell.Offset(0, 2).Text
    frmCRMimport.txtCity.Text = ActiveCell.Offset(0, 3).Text
    frmCRMimport.StateBox.Text = ActiveCell.Offset(0, 4).Text
    frmCRMimport.txtZip.Text = ActiveCell.Offset(0, 5).Text
    frmCRMimport.IndustryBox.Value = ActiveCell.Offset(0, 8).Value
    frmCRMimport.txtwebsite.Text = ActiveCell.Offset(0, 9).Text
    frmCRMimport.CompanyBox.Value = ActiveCell.Offset(0, 10).Value
    frmCRMimport.SubTypeBox.Value = ActiveCell.Offset(0, 11).Value

nd Sub
```



```
'Adds eligible companies in order to copy the data
'frmCRMimport.companycopy.RowSource = "Sheet1!Companycopy"

Dim AllCells As Range, Cell As Range
Dim NoDupes As New Collection
Dim i As Integer, j As Integer
Dim Swap1, Swap2, Item

The items are in a range named Companycopy
Set AllCells = Range("Companycopy")

The next statement ignores the error caused by attempting to add a duplicate key to th
On Error Resume Next
For Each Cell In AllCells
    NoDupes.Add Cell.Value, CStr(Cell.Value)
Next Cell

On Error GoTo 0

Sort the collection (optional)
For i = 1 To NoDupes.Count - 1
    For j = i + 1 To NoDupes.Count
        If NoDupes(i) > NoDupes(j) Then
            Swap1 = NoDupes(i)
            Swap2 = NoDupes(j)
            NoDupes.Add Swap1, before:=j
            NoDupes.Add Swap2, before:=i
            NoDupes.Remove i + 1
            NoDupes.Remove j + 1
        End If
    Next j
Next i

Add the sorted, non-duplicated items to a ListBox
For Each Item In NoDupes
    frmCRMimport.companycopy.AddItem Item
Next Item
```

6. Once all the information is entered into the UserForm, the user submits the data. The data is entered into the next available row.
    a. The userform unloads, resets, and reimports the company data in order to copy the information.

7. All of this data will then match the required fields and columns necessary for the script to import efficiently and correctly into the CRM.

Results

Immediately, this userform will be implemented with all the telemarketers and data entry personnel. Hopefully, it will speed up the process and purge the records so there aren’t 10 versions of the same company in the CRM. The telemarketers will now be able to send me the file when they are done every day and I won’t have to clean up the columns or entries.