VLOOKUP

Here's the scenario: I've got a Book of Business report exported to Excel from TAM, but I want it to include the Customer Name, not just the Policy Index or, if the report was sorted by Customer, the Customer Code in the Mainsort column with a C in front of every Customer Code.

The first thing I need is a column with a clean Customer Code. Insert a Column, and using either the *Left* function on the Pol_idx column, or *Text to Columns* on the Mainsort column, get the Customer Code in it's own column (in the example, it's in Column C).

Cool, now I can get the Customer Name on the spreadsheet. Here's where the *VLOOKUP* function comes in.

Run a Search from TAM that includes the Customer Code AND the Customer Name. This can be done from a Search-Customers, Main File. For this example, only include the Customer Number and Customer Name as the Selected Fields. When the Excel file opens, do "**Edit/Move** or **Copy Sheet**", selecting the workbook with the Book of Business as the book, and "**Move to end**". If you want to keep the original where it is, be sure to mark the "**Create a copy**" box. Now you have the Book of Business report on Sheet 1, and the Search-Customers, Main File report on Sheet 2 of the same workbook. You can now close the workbook created from the Search-Customers, Main File

Here's how Sheet 1 and Sheet 2 look now:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Commamt	Pol_idx	Client Code	Effective	Expires	Bco	Ico	Com_p	Co_type	Co_amt	Pr	Pr2
2	-15	BOOKR-110001	BOOKR-1	06/15/2000	06/15/2001	AET	AET	15	%	-15	KNJ	
3	97.5	BROWMI2-2001	BROWMI2	05/01/2000	05/01/2001	AET	AET	15	%	97.5	GGO	
4	136.65	ADLEDE1-1001	ADLEDE1	04/01/2000	10/01/2000	AOI	AOI	15	%	136.65	GGO	
5	147.45	ANDENA1-1001	ANDENA1	04/28/2000	10/28/2000	AOI	AOI	15	%	147.45	CJH	
6	235.35	BROWMI1-2001	BROWMI1	02/01/2000	08/01/2000	AOI	AOI	15	%	235.35	GGO	
7	113.85	HILLWI1-1001	HILLWI1	01/13/2000	07/../2000	AO..	..OI	15	%	113.85	GGO	

Sheet 1

	A	B
1	Ins_rec	Name
2	ABBOJO1	Joseph W. Abbot
3	ADLEDE1	Dean R. & Susan J. Adler
4	ANDENA1	Dr. Nancy Anderson
5	BOOKR-1	Mary Lewis D/B/A
6	BOXHI-1	Box Hill Systems Corporation
7	BROWMI1	Michael & Colleen Brown

Sheet 2

Before starting the vlookup function, you should sort both worksheets in the common workbook in the same manner. For this example, sort them by the Client Code or Ins_rec column.

In this example, the VLOOKUP function will compare the value in cell C2 on Sheet 1 to the values in Column A of Sheet 2. When it finds an **exact** match, it will enter the value that was found in Column B of Sheet 2 (the Customer Name) into the designated cell on Sheet 1.

1. **Insert** a Column to the left of Column D in Sheet 1.

Sheet 1

2. Type **=** in cell D2.
3. Click in the box above Column A, and select **VLOOKUP** from the list of functions (if you can see it), or click "**More Functions**" and find **VLOOKUP** in the Function List.

4. A Function Arguments window will open. Place your cursor in the **Lookup_value** field, and then click on cell **C2** (the first Client Code listed on Sheet 1).
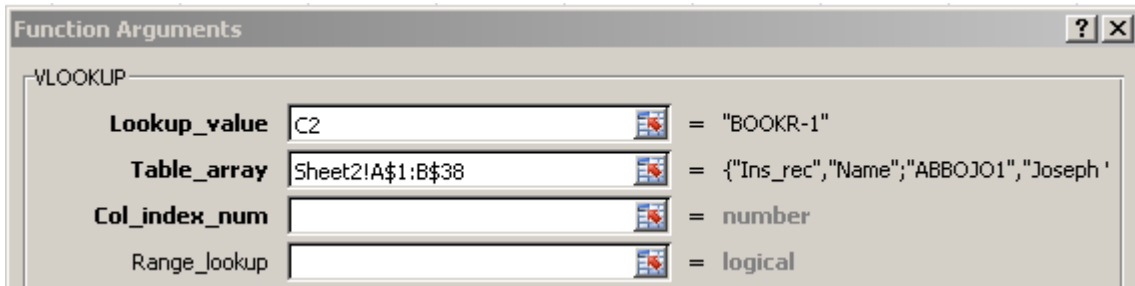

5. Tab, or place your cursor in the **Table_array** field, then click on Sheet 2, and go to the bottom of the sheet (assuming you have a long list). Start highlighting from the bottom up the data in Columns A and B. You can stop before going to the top, then just go into the "**Table_array**" field and

change the first cell selected for the range to "**A2**" (assuming you have headings on row 1). Enter a **$** sign between the column letters and the row numbers. This will lock down the range (or array) of columns and rows that Excel will look at on Sheet 2.


6. Tab, or place your cursor in the **Col_index_num** field and enter **2**. This is telling Excel that the value we want (the Customer Name) is in Column 2 of Sheet 2 (the Table Array).
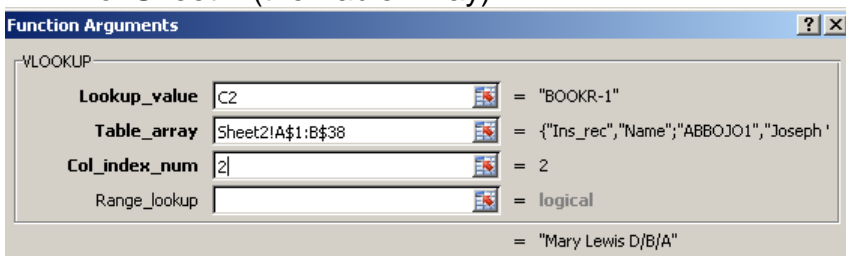
7. Tab to the **Range_lookup** field, and type **FALSE**. This means if there is no exact match found, you will see **#N/A** in the field.
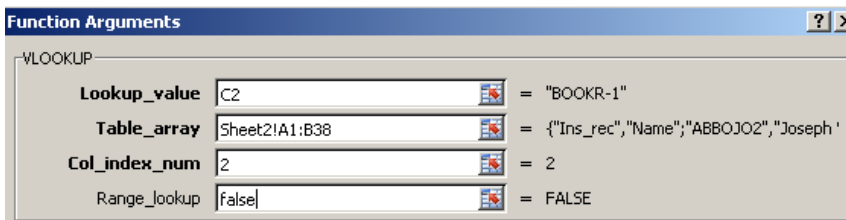
8. You can see the formula result (the Customer Name) in the bottom left corner of the window.
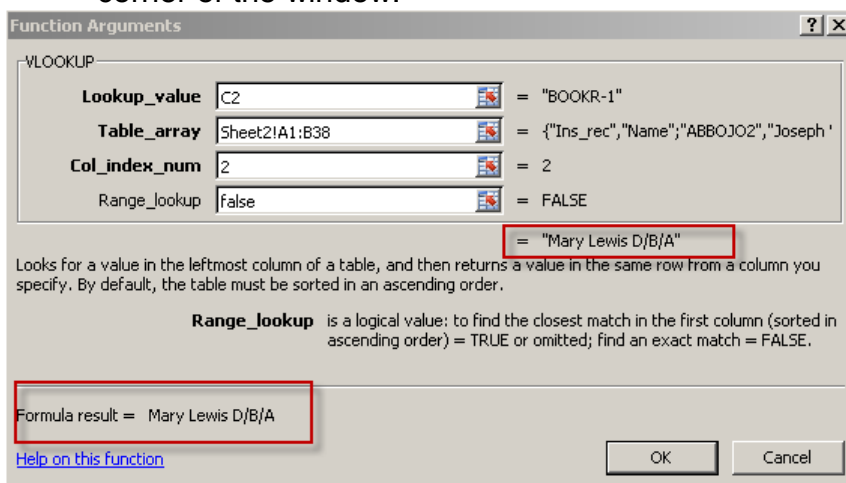
9. Click *OK*
10. If you want to avoid the **#N/A** showing, or want some other value to show (such as a blank field), you can add to the formula you have created so far for error handling.

    As an example, if the formula you have so far reads "=vlookup(c2,'Sheet2!a$2:b$38)", you can modify it to read:

=IF(ISERROR(VLOOKUP(C2,Sheet2!A$2:B$38,2,FALSE)),"",(VLOOKUP(C2,Sheet2!A$2:B$38,2,FALSE)))

    This will then enter a blank field instead of **#N/A**.

11. **Autofill** the formula into all the cells below cell D2 by placing your cursor in the bottom right hand corner of the cell. When the cursor changes to a black plus sign, double click. This will copy the vlookup formula into all the cells below.
12. If you'd like to convert the formula to the actual text, use the **Copy – Paste Special / Values** tool on the column.