



REPEATABLE CLEAN

A clean spreadsheet you can run again.

Top-tier client handover example

A worked demonstration of the rules, controls and reusable process supplied with the Repeatable Clean package.

10,000 ROWS INCLUDED	50 COLUMNS INCLUDED	£249 FIXED PRICE	5 days DELIVERY
--------------------------------	-------------------------------	----------------------------	---------------------------

DEMO

This is a fictional client handover.

All names, records and results are synthetic. The format demonstrates what a customer would receive after scope and rules have been agreed.

Prepared 10 August 2026 | Customer export clean-up

The engagement at a glance

The objective is not simply to make one file look tidier. It is to create a controlled, repeatable cleaning process for future exports with the same structure.

OUT

Agreed outcome

A clean working file, visible exceptions, a traceable audit record and a reusable script that can process the next matching export.

Included deliverables

No.	Deliverable	Purpose
01	Untouched source	Preserved reference copy for reconciliation.
02	Cleaned working file	Consistent values, filter-ready structure and QA status.
03	Exceptions register	Only records requiring business judgement, with the required action.
04	Change log	Material edits with source row, old value, new value and reason.
05	QA checks	Row reconciliation, duplicate checks, required fields and format validation.
06	Reusable cleaner	A rerunnable script plus retained rules for the same file structure.
07	Delivery report	A client-facing summary of outcomes, decisions and evidence.

Boundaries

Included: the agreed source structure, rules and one revision against those rules. **Not included:** new datasets, new business rules, API integrations, live-system access or decisions that require client context.

What arrived and what changed

A concise profile of the source file, the controlled treatments and the rows that still require a decision.

10	10	5	35
SOURCE ROWS	OUTPUT ROWS	EXCEPTIONS	CHANGES LOGGED

Source profile

Area	Source condition	Controlled treatment
Company names	Mixed case and extra spaces	Trimmed and converted to agreed title case
Status	active, Live, in progress, paused	Mapped to Active, Paused or Review
Dates	UK, ISO and free-text formats	Valid values converted to YYYY-MM-DD
Revenue	Symbols, separators and text	Numeric values normalised; unsafe values flagged
Record ID	One duplicate key	Both records retained in Exceptions

Before and after sample

Source value	Cleaned value	Status
north star ltd	North Star Ltd	PASS
Live	Active	PASS
01/08/2026	2026-08-01	PASS
not supplied		REVIEW

10/10

Row reconciliation passed

Every source row remains represented in the cleaned output or the exception trail. Nothing was silently removed.

Reusable cleaning specification

These rules are retained with the delivery and applied consistently by the reusable cleaner. Any future rule change creates a new specification version.

Rule	Field	Transformation	Exception behaviour	State
R-01	Company	Trim leading/trailing whitespace	Blank remains blank	Enabled
R-02	Company	Title case legal name	Preserve Ltd, Plc and LLP	Enabled
R-03	Status	Map Live and in progress to Active	Unknown values to Review	Enabled
R-04	Start Date	Convert valid dates to YYYY-MM-DD	Invalid dates to Exceptions	Enabled
R-05	Revenue GBP	Remove currency symbols and separators	Text values to Exceptions	Enabled
R-06	Record ID	Detect exact duplicate keys	Never auto-delete	Enabled
R-07	Email	Lowercase and trim	Invalid pattern to Review	Enabled
R-08	Postcode	Uppercase and standard spacing	Missing required value to Review	Enabled

RULE

No silent guesses

If a responsible answer depends on business context, the record is retained and marked REVIEW. The script does not invent a value.

How to run the cleaner again

The rerun package is designed for a new export with the same columns and meanings. It produces a fresh output folder without changing the source file.

01 Place the new export in the input folder

Use the original column headings. Do not overwrite a previous source file.

```
input/customer_export_2026-09-01.xlsx
```

02 Run the supplied command

The cleaner profiles the file, checks the schema and applies the retained specification.

```
python clean_customer_export.py input/customer_export_2026-09-01.xlsx --output  
delivery/2026-09-01
```

03 Review the Exceptions file

Resolve only records marked REVIEW. Keep the original source values visible when confirming a treatment.

04 Check the QA summary

Confirm row reconciliation, required-field checks, duplicate count and validation results before using the clean file.

05 Archive the complete run

Retain the source, specification version, clean file, exceptions, change log and QA summary together.

Stop conditions

Condition	Script response	Client action
Required column missing	Run stops	Restore the column or agree a new specification
Unexpected column added	Run continues with warning	Confirm whether the field should be included
Row count changes during processing	Run fails QA	Do not use output; inspect the log
New category value	Record marked REVIEW	Approve a mapping rule

Exceptions requiring a decision

Exceptions are not hidden failures. They are source records where a reliable treatment requires client context.

Row	Issue	Field	Source value	Required action	Status
3	Duplicate key	Record ID	A-002 occurs twice	Confirm keeper or merge rule	REVIEW
4	Duplicate key	Record ID	A-002 occurs twice	Confirm keeper or merge rule	REVIEW
5	Invalid value	Start Date	31/02/2026	Provide the correct date	REVIEW
9	Invalid value	Revenue GBP	not supplied	Provide amount or approve blank	REVIEW
10	Missing value	Postcode	Required field blank	Provide postcode	REVIEW

Decision record

For each resolved exception, the approved instruction is added to the decision record. If it is reusable, it becomes a versioned rule. If it is record-specific, it is logged without changing future behaviour.

NEXT

Client action required

Confirm the five decisions above. The final clean file is issued only after the approved treatments have been applied and QA has been rerun.

Quality checks and evidence

The evidence below confirms what was checked, what passed and what remains visible for human review.

Check	Evidence	Result
Source readable	Workbook opens and target sheet exists	PASS
Schema	Required columns present	PASS
Row reconciliation	10 source rows = 10 accounted rows	PASS
Duplicate keys	One duplicate group isolated	REVIEW
Required fields	One missing postcode isolated	REVIEW
Date validation	One invalid date isolated	REVIEW
Output formulas	No spreadsheet formula errors	PASS
Change record	35 material changes documented	PASS

Proof Pack summary

A visual overview of the technical workbook supplied alongside the client-facing Delivery Report.

	A	B	C	D	E	F	G	H
1	ROW & BEHOLD CLIENT PROOF PACK							
2	Cleaned, checked and fully explained Synthetic portfolio demonstration							
3	SUMMARY · CLEANED DATA · EXCEPTIONS · CHANGE LOG · QA CHECKS · CLEANING RULES · SOURCE COPY							
4								
5	DELIVERY AT A GLANCE							
6	SOURCE ROWS		CLEANED ROWS		EXCEPTIONS		CHANGES LOGGED	
7								
8	10		10		5		35	
9								
10								
11	REVIEW REQUIRED				10 / 10 ROWS RECONCILED			
12								
13								
14								
15	REVIEW QUEUE				YOUR DELIVERY INCLUDES			
16	Possible duplicate rows		2		✓ Preserved source copy			
17	Missing required values		1		✓ Cleaned working file			
18	Unexpected values		2		! Exceptions requiring a decision			
19	Rows requiring review		5		✓ Material change log			
20					✓ Formula-driven QA checks			
21								
22								
23	REVIEW is a control, not a failed delivery. Ambiguous records stay visible in Exceptions so you can decide them safely. No source row is silently discarded.							
24								

Synthetic portfolio demonstration. No client data is shown.

Your final handover

The delivery folder keeps the human explanation, technical evidence and reusable process together.

File	Purpose	Action
01_Delivery_Report.pdf	Client-facing summary, outcomes and decisions	Open first
02_Cleaned_Working_File.xlsx	Clean, filter-ready data	Use after exceptions are resolved
03_Exceptions.xlsx	Records needing business judgement	Client review
04_Change_Log.xlsx	Traceable material edits	Retain for audit
05_QA_Summary.xlsx	Reconciliation and validation evidence	Confirm PASS results
06_Cleaning_Rules.xlsx	Versioned reusable specification	Control future reruns
07_clean_customer_export.py	Reusable cleaner for matching exports	Run locally
08_Rerun_Guide.docx	Plain-English operating instructions	Keep with script

Acceptance checklist

Control	Acceptance criterion
Source preserved	The original file remains untouched and readable.
Counts reconciled	All source rows are represented or visible in Exceptions.
Rules approved	Cleaning Rules reflects the agreed specification version.
Exceptions decided	Outstanding business decisions are confirmed in writing.
Rerun tested	The script completes against the demonstration export.

DONE

Ready for the next matching export

Once accepted, the same controlled process can be rerun without rebuilding the cleaning logic from scratch.

hello@rowandbehold.co.uk | rowandbehold.co.uk