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TRAINING SPECIALIST

Data Fitness with Mr./Ms. Clean



AGENDA

- ◀ Benefits of a Healthy Database
- ◀ Data Entry Best Practice
- ◀ Code Maintenance
- ◀ Duplicate Maintenance
- ◀ Global Update/Delete
- ◀ Export/Import for the Win!



Benefits of a Healthy Database



Benefits of a Healthy Database

Report Integrity

Filters will work
GIGO

Less duplication

\$ for records
\$ for postage

Fast, intuitive gift entry



Data Entry Best Practice



Garbage In/Garbage Out

GIGO

Constituent Contact Information
Keep data clean with our [printable checklist](#)

Donor ID

Donor Type

Organization

Title (Mr/Mrs)

First Name

Middle Name

* Last Name

Suffix

Salutation

Informal Salutation

Professional Title

Optional Line

Address

Address 2

City

State

Zip/Postal

AA20 20AA

and vs. &

Data Entry Protocol

DP Style Guide

Inform Users

Consistency

Crucial for accurate reporting

Mail Merge

Limit User Privileges

Individual vs. Organization

Individual

Donor ID	<input type="text" value="70"/>
Donor Type	<input type="text" value="Individual"/>
Organization?	<input type="checkbox"/>
Title (Mr/Ms)	<input type="text" value="Mr."/>
* Last Name	<input type="text" value="Smith"/>
First Name	<input type="text" value="Martin"/>
Salutation	<input type="text" value="Mr. Smith"/>
Professional Title	<input type="text"/>
Optional Line	<input type="text"/>
Address	<input type="text" value="50 Alpine Road"/>
Address 2	<input type="text"/>
City	<input type="text" value="Paoli"/>
State	<input type="text" value="PA"/>
Zip	<input type="text" value="19301"/>
	<input type="button" value="Verify Address"/>

Organization

Donor ID	<input type="text" value="80021"/>
Donor Type	<input type="text" value="Company"/>
Organization?	<input checked="" type="checkbox"/>
* Org. Name	<input type="text" value="Ice Cream Palace"/>
Org. Prefix	<input type="text" value="The"/>
Salutation	<input type="text" value="Ms. Bush"/>
Professional Title	<input type="text" value="Owner"/>
Contact	<input type="text" value="Holly Bush"/>
Address	<input type="text" value="29 Main Street"/>
Address 2	<input type="text" value="Suite 190"/>
City	<input type="text" value="Philadelphia"/>
State	<input type="text" value="PA"/>
Zip	<input type="text" value="19044"/>
	<input type="button" value="Verify Address"/>

Same Data – Two Views



Code Maintenance

Code Maintenance

Consistent Data Entry

- Create your own codes
- Reduces data entry errors



Facilitates Filtering

- Segmentation in field
- Common denominators

Report Integrity

- Good, consistent codes create accurate, robust reports

Referenced Elsewhere

- Online Forms
- Mail merge
- Reports
- Export Templates

Code Maintenance

Use of Coded Fields

Intuitive use of fields for data tracking

Add New Codes

Track new events/campaigns

Code Clean Up

Concise code lists for easier data entry

Add New Codes

Add code on screen


 Next to field

OR


- Settings > Code Maintenance

Gift Details Accept gifts with an online donation form!

Gift ID #

* Date 

Type of Gift  



Gift Amount 



Fair Market Value


Reference / Check Number


General Ledger  

Class 

Campaign  

Solicitation  

Sub Solicitation 

Gift Solicitor 

Thank-You Letter  

Receipt Numbers

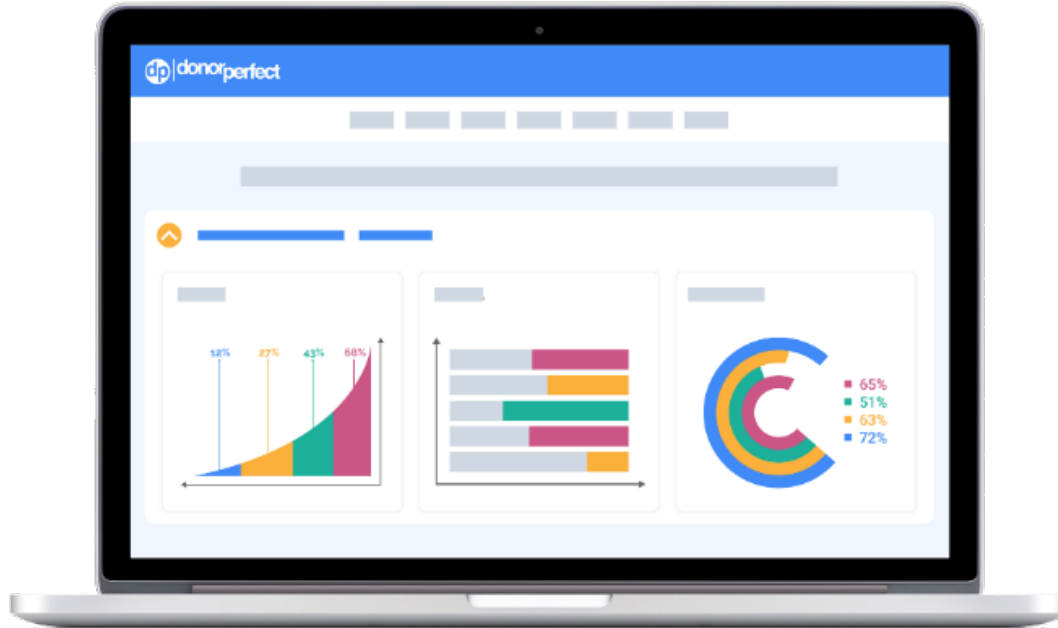
Screen Designer

SmartActions

Tributes

User Management

Time for a Demonstration





Global Update/Delete



Updating Data

Changing codes for a group of records



Moving Data

Moving information from one data field to another

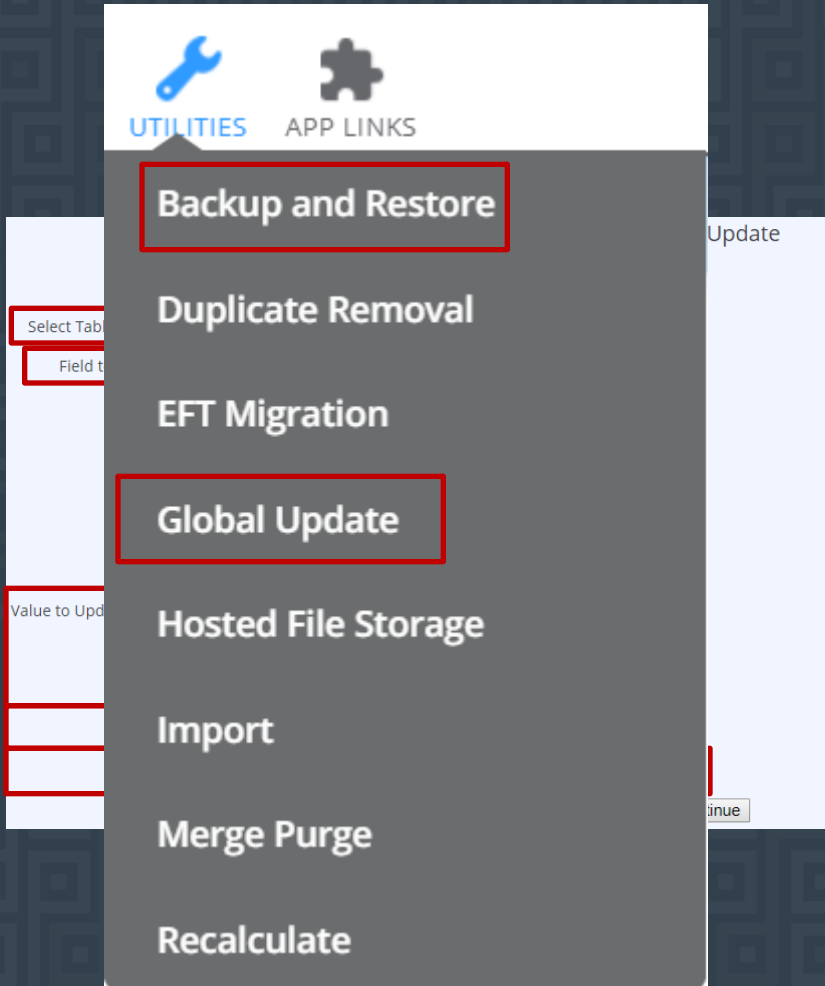


Deleting Data

Removing codes, data, or constituent records

Why Global Update/Delete?



Global Update



Utilities>Backup and Restore!
Utilities>Global Update
Update fields on any screen
Update with value from
another field
Must use a filter

Annual Appeal

AA20 20AA

Gift ID #	<input type="text" value="18914"/>
* Date	<input type="text" value="06/18/2019"/> 
Type of Gift	<input type="text" value="VISA - EFT"/> ▼ +
Gift Amount	<input type="text" value="\$50.00"/> 
Fair Market Value	<input type="text" value="\$0.00"/>
Reference / Check Number	<input type="text" value="4751900051"/>
General Ledger	<input type="text"/> ▼ +
Class	<input type="text"/> ▼ +
Campaign	<input type="text"/> ▼ +
Solicitation	<input type="text"/> ▼ +
Sub Solicitation	<input type="text"/> ▼ +
Gift Solicitor	<input type="text"/> ▼ +
Thank-You Letter	<input type="text"/> ▼ +

Global Update

Solicitation without Year

Add new code

Filter for gifts with old code
and date range

Globally Update gifts with
new code

Inconsistent Codes

Filter for gifts with old code

Gifts without Codes

Global Delete

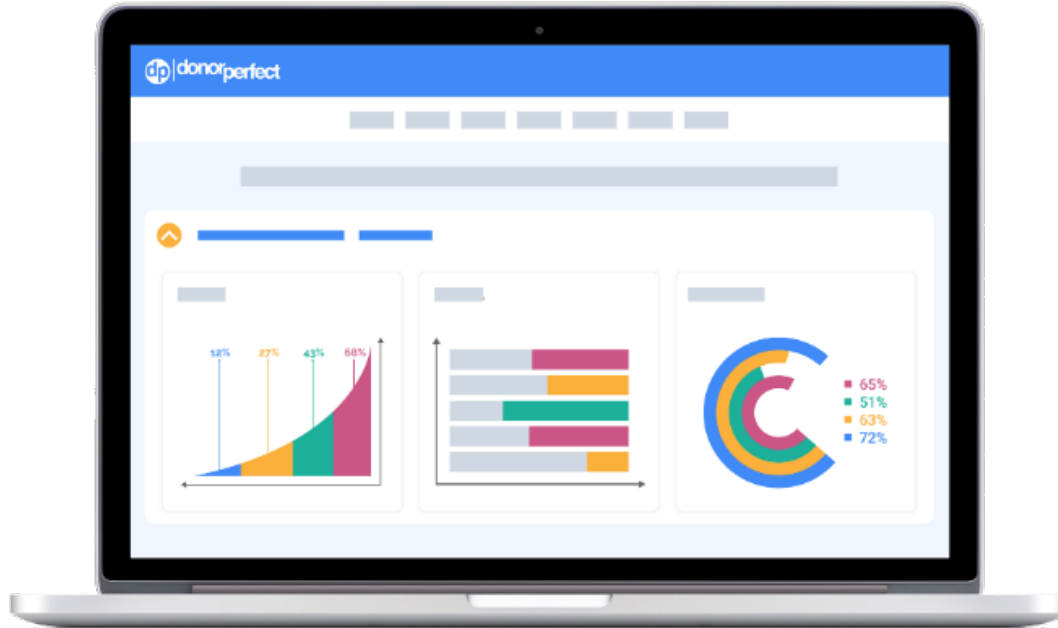
**Records with No Gifts*

**Records whose last gift was prior to 7 years ago*

Not sure? Call Support!



Time for a Demonstration





Duplicate Maintenance

Duplicate Maintenance



Utilities>Backup and Restore!

Utilities>Duplicate Removal

Combine/Merge Duplicates

**Combines Transactional Data,
i.e. Gifts, Pledges, Contacts,
Notes, etc.**

“Not Duplicates”

Duplicate Removal

Quick Search

Advanced Search

HOME ADD NEW RECEIPTS MAILINGS REPORTS TASKS UTILITIES APP LINKS

Duplicate Removal

Compare for:

<input checked="" type="checkbox"/> Last Name	Number of characters to compare in last name	<input type="text" value="10"/>
<input checked="" type="checkbox"/> First Name	Number of characters to compare in first name	<input type="text" value="8"/>
<input checked="" type="checkbox"/> Address	Number of characters to compare in address	<input type="text" value="8"/>
<input checked="" type="checkbox"/> Zip	Number of characters to compare in zip	<input type="text" value="5"/>
<input type="checkbox"/> Email	Number of characters to compare in email	<input type="text" value="0"/>
<input type="checkbox"/> Home Phone	Number of characters to compare in home phone	<input type="text" value="0"/>
<input type="checkbox"/> Mobile Phone	Number of characters to compare in mobile phone	<input type="text" value="0"/>
<input type="checkbox"/> City	Number of characters to compare in city	<input type="text" value="0"/>
<input type="checkbox"/> State Abbrev.	Number of characters to compare in the state abbreviation	<input type="text" value="0"/>
<input type="checkbox"/> Country	Number of characters to compare in the country name	<input type="text" value="0"/>

Settings for manual combine:

Simple Combine

Advanced Combine

Auto De-dupe

Number of pairs to include (number of top results)

Include NULL values

Set selection filter...

Backup and Restore

Duplicate Removal

EFT Migration

Global Update

Hosted File Storage

Import

Merge Purge

Recalculate

Matching Criteria
Simple or Advanced Combine
Manual Combine
Include NULL values
Filter can be used

Duplicate Report

Donor	Possible Duplicates	Action		
		SIMPLE	ADVANCED	NOT DUPLICATES
ID # 148 Susan Reyes 381 Pine Street Lebanon, PA 17830	ID # 1222 Susan Reyes 381 Pine Street Lebanon, PA 17830	SIMPLE	ADVANCED	NOT DUPLICATES
ID # 730 45745Mr. Roger Sandstone Mrs. Lisa Smith-Sandstone 1303 Morgan Horse Dr Warrington, PA 18976-1924	ID # 1223 Mr. Roger Sandstone Mrs. Lisa Smith 1303 Morgan Horse Dr Warrington, PA 18976-1924	SIMPLE	ADVANCED	NOT DUPLICATES
Total Number of possible duplicates: 2				

Simple Combine
Advanced Combine
Not Duplicates

Manual Combine

Simple

Advanced

Lookup Name		Lookup Name	
ID #	730	Edit Record	
Name	45745Mr. Roger Sandstone	<input type="radio"/> <--	Mr. Roger Sandstone
Opt. Line	Mrs. Lisa Smith-Sandstone		Mrs. Lisa Smith
Address	1303 Morgan Horse Dr	<input checked="" type="radio"/> -->	1303 Morgan Horse Dr
Address 2			
City State Zip	Warrington, PA 18976-1924		Warrington, PA 18976-1924
# of Gifts	119		17
Gift Total	\$12,630.70	Combine	\$1,800.00

Source Record	Destination Record	Result	Combine
Main Screen Fields (DP)			
Donor ID	1223	730	730
First Name	<input type="radio"/> Roger	<input checked="" type="radio"/> Roger	Roger
Last Name	<input type="radio"/> Sandstone	<input checked="" type="radio"/> Sandstone	Sandstone
Middle Name	<input type="radio"/>	<input checked="" type="radio"/>	
Suffix	<input type="radio"/>	<input checked="" type="radio"/>	
Title (Mr/Mrs)	<input type="radio"/> Mr.	<input checked="" type="radio"/> 45745Mr.	45745Mr.
Salutation	<input type="radio"/> Roger and Lisa	<input checked="" type="radio"/> Roger And Lisa	Roger And Lisa
Professional Title	<input type="radio"/>	<input checked="" type="radio"/>	
Optional Line	<input type="radio"/> Mrs. Lisa Smith	<input checked="" type="radio"/> Mrs. Lisa Smith-Sandstone	Mrs. Lisa Smith-Sandstone
Address	<input type="radio"/> 1303 Morgan Horse Dr	<input checked="" type="radio"/> 1303 Morgan Horse Dr	1303 Morgan Horse Dr
Address 2	<input type="radio"/>	<input checked="" type="radio"/>	
Address 3	<input type="radio"/>	<input checked="" type="radio"/>	
Address 4	<input type="radio"/>	<input checked="" type="radio"/>	
City	<input type="radio"/> Warrington	<input checked="" type="radio"/> Warrington	Warrington
State	<input type="radio"/> Pennsylvania	<input checked="" type="radio"/> Pennsylvania	Pennsylvania
Zip/Postal	<input type="radio"/> 18976-1924	<input checked="" type="radio"/> 18976-1924	18976-1924
Country	<input type="radio"/> United States	<input checked="" type="radio"/> United States	United States
Address Type	<input type="radio"/> Home	<input checked="" type="radio"/>	
Home Phone	<input type="radio"/>	<input checked="" type="radio"/>	
Business Phone	<input type="radio"/>	<input checked="" type="radio"/>	
Fax Phone	<input type="radio"/>	<input checked="" type="radio"/>	
Cell Phone	<input type="radio"/>	<input checked="" type="radio"/>	
E-Mail	<input type="radio"/> rsandstone@gmail.com	<input checked="" type="radio"/> rsandstone@email.net	rsandstone@email.net
Organization	<input type="radio"/> N	<input checked="" type="radio"/> N	N
Donor Type	<input type="radio"/> Individual	<input checked="" type="radio"/> Individual	Individual
Do Not Send Mail	<input type="radio"/> N	<input checked="" type="radio"/> N	N
No Mail Reason	<input type="radio"/>	<input checked="" type="radio"/>	
Number of Gifts	17	119	136
Lifetime Gift Total	1800	12630.7	14430.7
Created by	webtrain10	webtrain10	webtrain10
Number of Gifts	17	119	136
Lifetime Gift Total	1800	12630.7	14430.7
Gift Aid Eligible?	<input type="radio"/>	<input checked="" type="radio"/>	

Auto De-dupe

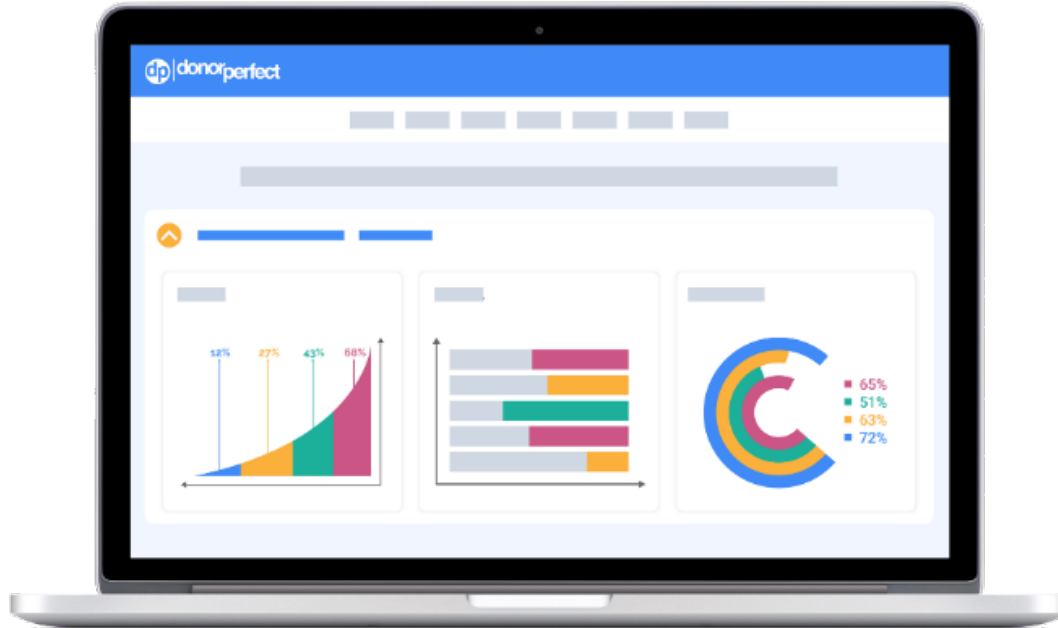
Donor	Possible Duplicates	Combine?
ID # 148 Susan Reyes 381 Pine Street Lebanon, PA 17830	ID # 1222 Susan Reyes 381 Pine Street Lebanon, PA 17830	<input checked="" type="checkbox"/>
ID # 730 45745Mr. Roger Sandstone Mrs. Lisa Smith-Sandstone 1303 Morgan Horse Dr Warrington, PA 18976-1924	ID # 1223 Mr. Roger Sandstone Mrs. Lisa Smith 1303 Morgan Horse Dr Warrington, PA 18976-1924	<input checked="" type="checkbox"/>

Total number of duplicates based on your parameters: 2. Approximate merging time: [0.07 minutes](#).

Direction of the merge: **Older to Newer** **Newer to Older**

Auto-Combine Selected Records

Time for a Demonstration



Clean Data = Happy Data

Data Entry Best Practice

- Consistency is KEY
- Report integrity



Code Maintenance

- Consistent data entry
- Facilitates filtering

Global Update

- Update inconsistent data
- Move data
- Delete data and/or records

Duplicate Maintenance

- Merge duplicate records
- Keep all transactional data

Questions?



HAPPY!

It might seem crazy what I'm 'bout to say

Having clean data will make your day!

Don't you get lazy and enter anything

Because if you do you won't be able to sing...

Because I'm happy

Clap along if you feel like your database is clean

Because I'm happy

Clap along if you feel like you know what I mean

Because I'm happy

Clap along if you know what you need to do

Because I'm happy

Clap along if you feel like that's what your gonna do



THANK YOU!





DPC3

DONORPERFECT CANADIAN CLIENT CONFERENCE