

5 Ways to Clean Up Your Database



Data cleansing is so important because it improves your data quality and in doing so, increases overall productivity.

When you clean your data, all outdated or incorrect information is gone – leaving you with the highest quality information.

The most common types of “dirty” data:

- Duplicate Data
- Outdated Data
- Incomplete Data
- Inaccurate/Incorrect Data

What you can do:

1. Identify & Merge Duplicates
2. Review your “Not in CRM Records”
3. Enlist Your Members Help in Updating information
4. Clean Up Email Addresses
5. Review & Update Group Participation

Where does duplication come from?

- One of the most common explanations is human error
- However, if you have excelled at managing prospects in your system, duplicates may simply have been created through no fault of your staff, but because the prospect completed an on-line application. NOTE: recently introduced functionality will allow you to verify that the applicant does not exist in your database prior to approving

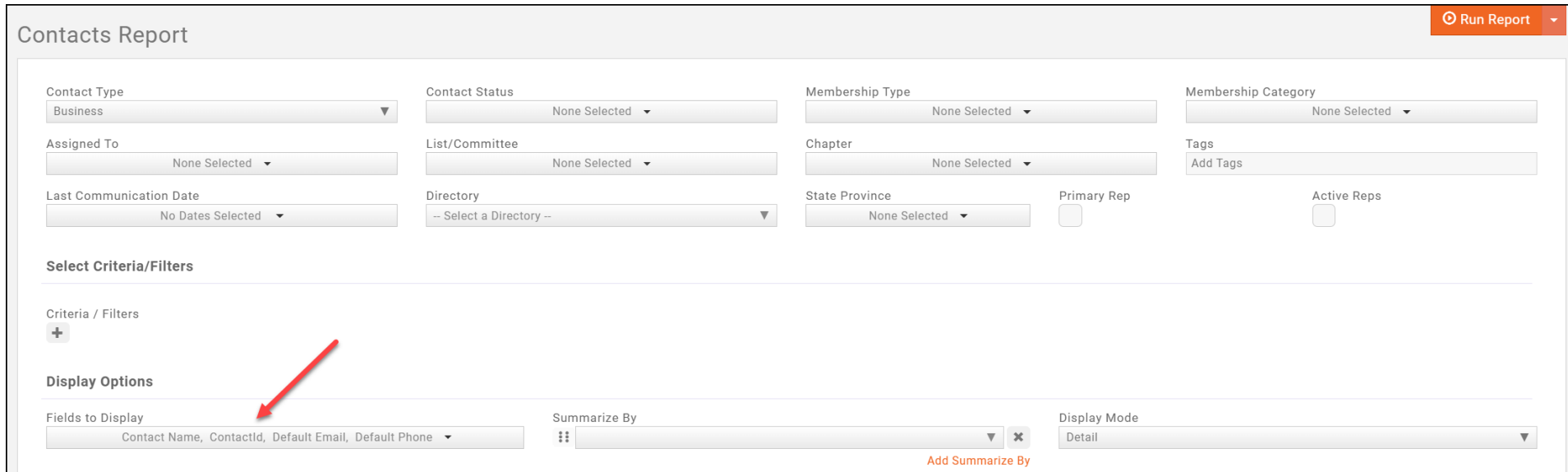
- The system will NOT AUTOMATICALLY create new contacts in your database except in the following situations:
 - Your application is configured to auto-approve applicants
 - You have imported a list of contacts via the lists/committees functionality and selected “automatically” create contact if not found in database

All other contacts have been created in your database
through human interaction

1...Identify & Merge Duplicates

Identify Duplicates - Organizations

- Use the Contacts report, include Organization Name and Contact ID – status is also useful, as well as other identifying information (ie. Email address, website, etc.)
- The Contact ID identifies a unique record in your database – if the same organization has multiple contact id's then you may have duplicates



Contacts Report Run Report

Contact Type: Business
Contact Status: None Selected
Membership Type: None Selected
Membership Category: None Selected
Assigned To: None Selected
List/Committee: None Selected
Chapter: None Selected
Tags: Add Tags
Last Communication Date: No Dates Selected
Directory: -- Select a Directory --
State Province: None Selected
Primary Rep:
Active Reps:

Select Criteria/Filters

Criteria / Filters
+

Display Options

Fields to Display: Contact Name, ContactId, Default Email, Default Phone
Summarize By:
Display Mode: Detail

[Add Summarize By](#)

1...Identify & Merge Duplicates

Identify Duplicates - Organizations

- Export to Excel,
- Use Excel functionality to highlight duplicates
 - Conditional Formatting > Highlight Cell Rules > Duplicates

Fortunes	Non Member	6125141		(218) 546-3478
Fortunes	Active	4675806		
Franny's Floral	Active	4701093	franny@mailinator.com	(218) 123-1224
Fran's Building Supply	Active	4758191	franbuild@mailinator.com	21567876543
Franson's Manufacturing	Non Member	5525522	michellef@mailinator.com	
Fritz	Active	6125853		(218) 123-4564
Fritz	Non Member	4701085		
Furry Friends	Active	2991318	furry@mailinator.com	
Gaufrettes	Active	1810716	harry@mailinator.com	218-876-8765

1...Identify & Merge Duplicates

Identify Duplicates - Individuals

- The same process can be used to look for individuals
- Include the Individual Contact Name and Contact ID as well as other identifying information in the Contacts Report
- If the same individual has multiple contact id's then you may have duplicates. Use other identifying information to research

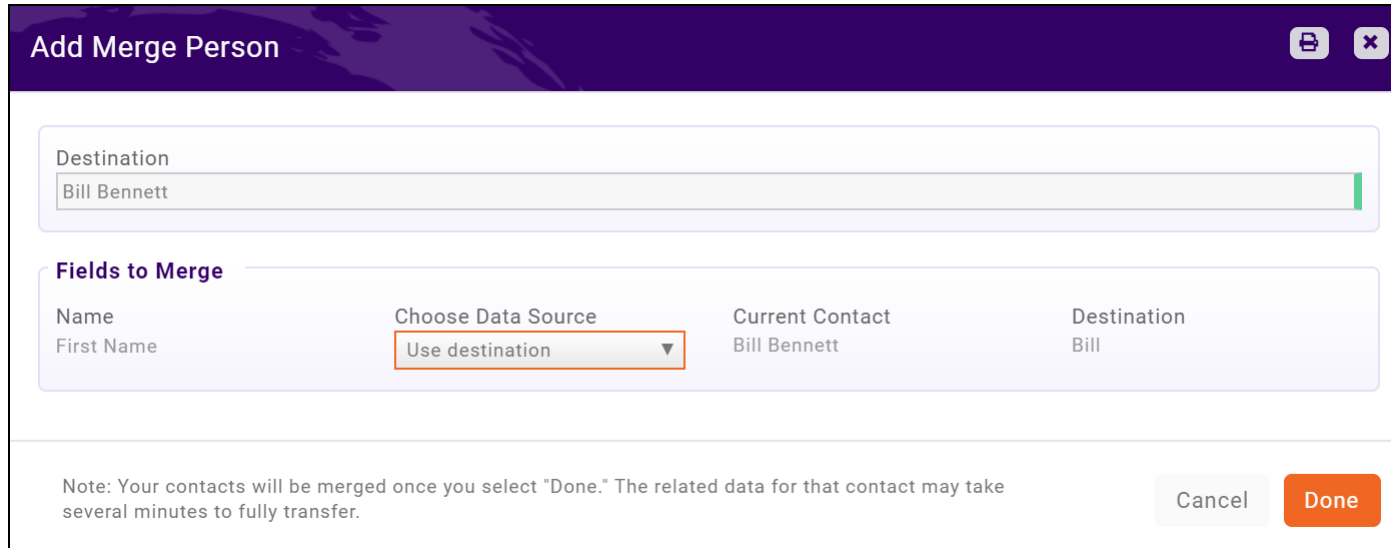
Frank Mayers	1520144	mayers@mailinator.com		
Frank Miller	5295901			The Treehouse
Franny Fay	6127148	franny@mailinator.com	(218) 345-1238	Fortunes
Franny Fay	6127151	franny@mailinator.com	(218) 123-9876	Chewy Chewy
Franny Floral	2541417	gale@mailinator.com		Floral Shop
Franny May	1520148	franny@mailinator.com		

1...Identify & Merge Duplicates

Merge Duplicates

- Best Practice: Merge the oldest record into the newest record
- Use the created date to identify the oldest record
- You will options to choose information that you wish to retain, but ultimately all information will be merged over

WIKI: [Merge Members](#)



The screenshot shows a dialog box titled "Add Merge Person" with a dark purple header. It contains a search field for "Destination" with "Bill Bennett" entered. Below is a "Fields to Merge" section with a table:

Name	Choose Data Source	Current Contact	Destination
First Name	Use destination	Bill Bennett	Bill

At the bottom, there is a note: "Note: Your contacts will be merged once you select 'Done.' The related data for that contact may take several minutes to fully transfer." and two buttons: "Cancel" and "Done".

2...Review your “Not in CRM” Records

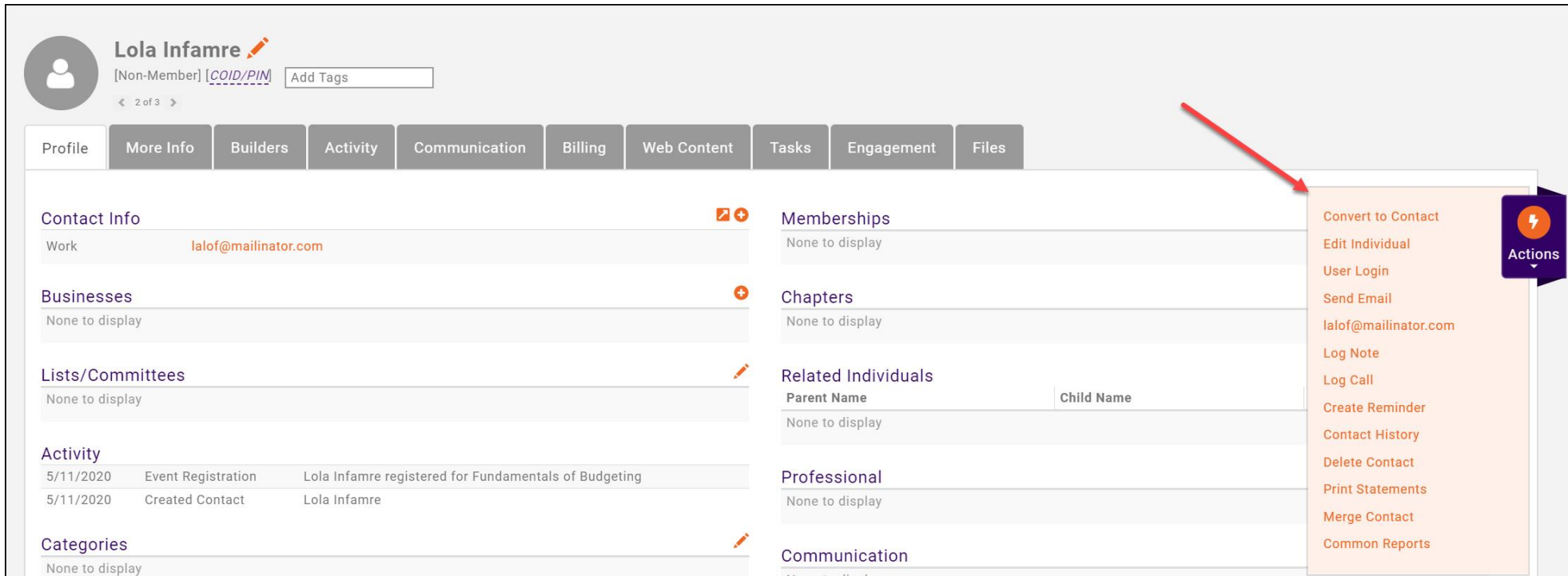
Not in CRM Records are created for event attendees who are not contacts – in some cases:

- These may be true contacts – simply not identified as such when registered and should be merged
- Or they may be contacts that you wish to add to your database as Non-members

2...Review your “Not in CRM” Records

Not in CRM Records are created for event attendees who are not contacts – in some cases, these may be true contacts – simply not identified as such when registered, or they may be contacts that you wish to add to your database as Non-members

WIKI: [View Potential Contacts Event Attendees](#)



The screenshot displays the profile page for a contact named Lola Infamre, identified as a [Non-Member]. The page includes a navigation bar with tabs for Profile, More Info, Builders, Activity, Communication, Billing, Web Content, Tasks, Engagement, and Files. The main content area is divided into several sections: Contact Info (Work email: lalof@mailinator.com), Businesses (None to display), Lists/Committees (None to display), Activity (5/11/2020 Event Registration: Lola Infamre registered for Fundamentals of Budgeting; 5/11/2020 Created Contact: Lola Infamre), and Categories (None to display). On the right side, there are sections for Memberships, Chapters, Related Individuals (with columns for Parent Name and Child Name), Professional, and Communication. A red arrow points to an 'Actions' dropdown menu on the right, which contains the following options: Convert to Contact, Edit Individual, User Login, Send Email, lalof@mailinator.com, Log Note, Log Call, Create Reminder, Contact History, Delete Contact, Print Statements, Merge Contact, and Common Reports.

3...Request that Members Update their Information

Fix Your Out Dated Data!

- Your members are the best source for the most up to date and accurate information
- Use the **Verify Business Contact Information** email template to request that they review and update their own information. NOTE: This option requires that members have access to the Info Hub
- WIKI: [Send Verify Business Contact Information eMail](#)

Change happens. Have you updated the contact information for your business recently? Take a few moments to review the information below and then access the Info Hub to make changes if needed.

Business Information	
Company Name	A Place for Dogs
Primary Phone	<none>
Website	<none>
Physical Address	1234 Nisswa MN
Mailing Address	24400 Smiley Road Nisswa MN
Billing Contact Name	Daniel McKay PHD
Billing Contact Email	danny@mailinator.com
Billing Contact Phone	<none>
Billing Contact Address	<none>

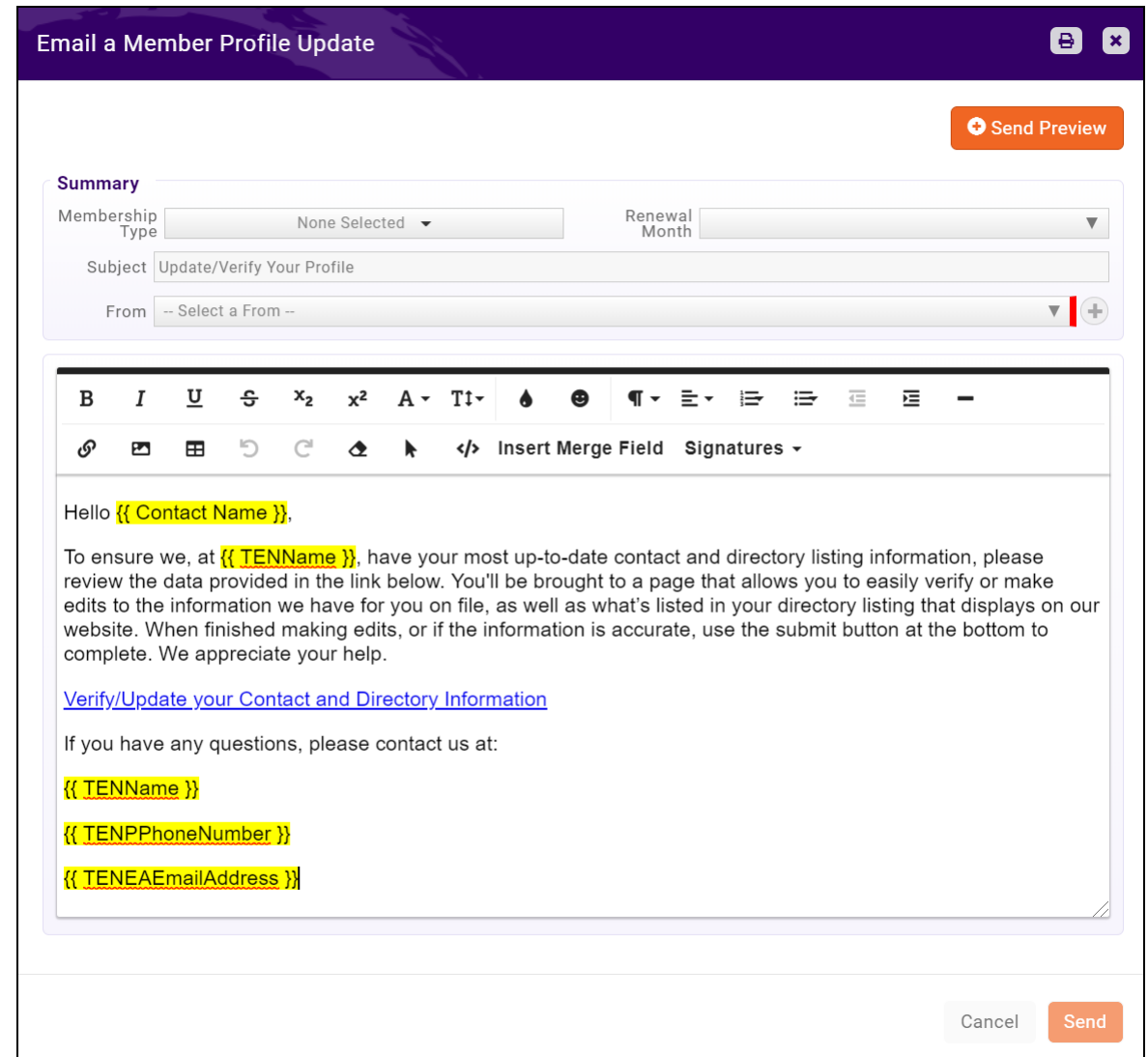
Sign in [here](#) to update your info.

Forgot your password? click [here](#)

3...Request that Members Update their Information

Alternately, from the main Contact page, you can send an email to multiple members to allow them to update their business information without having to access the Info Hub

WIKI: [Send Member an Email to Contact\(s\) to Update their Profile](#)



The screenshot shows a web interface titled "Email a Member Profile Update". At the top right, there is a "Send Preview" button. Below the title bar, there is a "Summary" section with the following fields:

- Membership Type: None Selected (dropdown)
- Renewal Month: (dropdown)
- Subject: Update/Verify Your Profile
- From: -- Select a From -- (dropdown)

Below the summary is a rich text editor with a toolbar containing various formatting options (bold, italic, underline, link, unlink, text color, background color, bulleted list, numbered list, indent, outdent, undo, redo, insert merge field, signatures, etc.). The editor contains the following text:

Hello {{ Contact Name }},

To ensure we, at {{ TENName }}, have your most up-to-date contact and directory listing information, please review the data provided in the link below. You'll be brought to a page that allows you to easily verify or make edits to the information we have for you on file, as well as what's listed in your directory listing that displays on our website. When finished making edits, or if the information is accurate, use the submit button at the bottom to complete. We appreciate your help.

[Verify/Update your Contact and Directory Information](#)

If you have any questions, please contact us at:

- {{ TENName }}
- {{ TENPPhoneNumber }}
- {{ TENEAEmailAddress }}

At the bottom right of the editor, there are "Cancel" and "Send" buttons.

4...Review Your Failed/Invalid eMails

- Fix Bad Data!
 - Bad eMail addresses not only prevent your members from receiving your communications, but will also impact your sender reputation
 - Use the **Failed/Invalid eMail** report to review and correct bad eMail address data
 - **Know the difference...** A **bounced email** is an **email** that has either been typed in wrong or cannot be found or the recipient's mailbox is full or the receiving server times out... A **rejected email** is usually because a client has marked an **email** as spam or unsubscribed

4...Review Your Failed/Invalid eMails

- Generate the Failed/Invalid eMail Report and review for possible active members with eMail addresses that are not getting through

Failed/Invalid Email Communications Report

Run Report

Communication Date

Email Validity Change Date

Contact

Additional Criteria / Filters

+

Contact Membership Status

Equals

Active

x

Display Options

Fields to Display

Summarize By

x

Add Summarize By

Display Mode

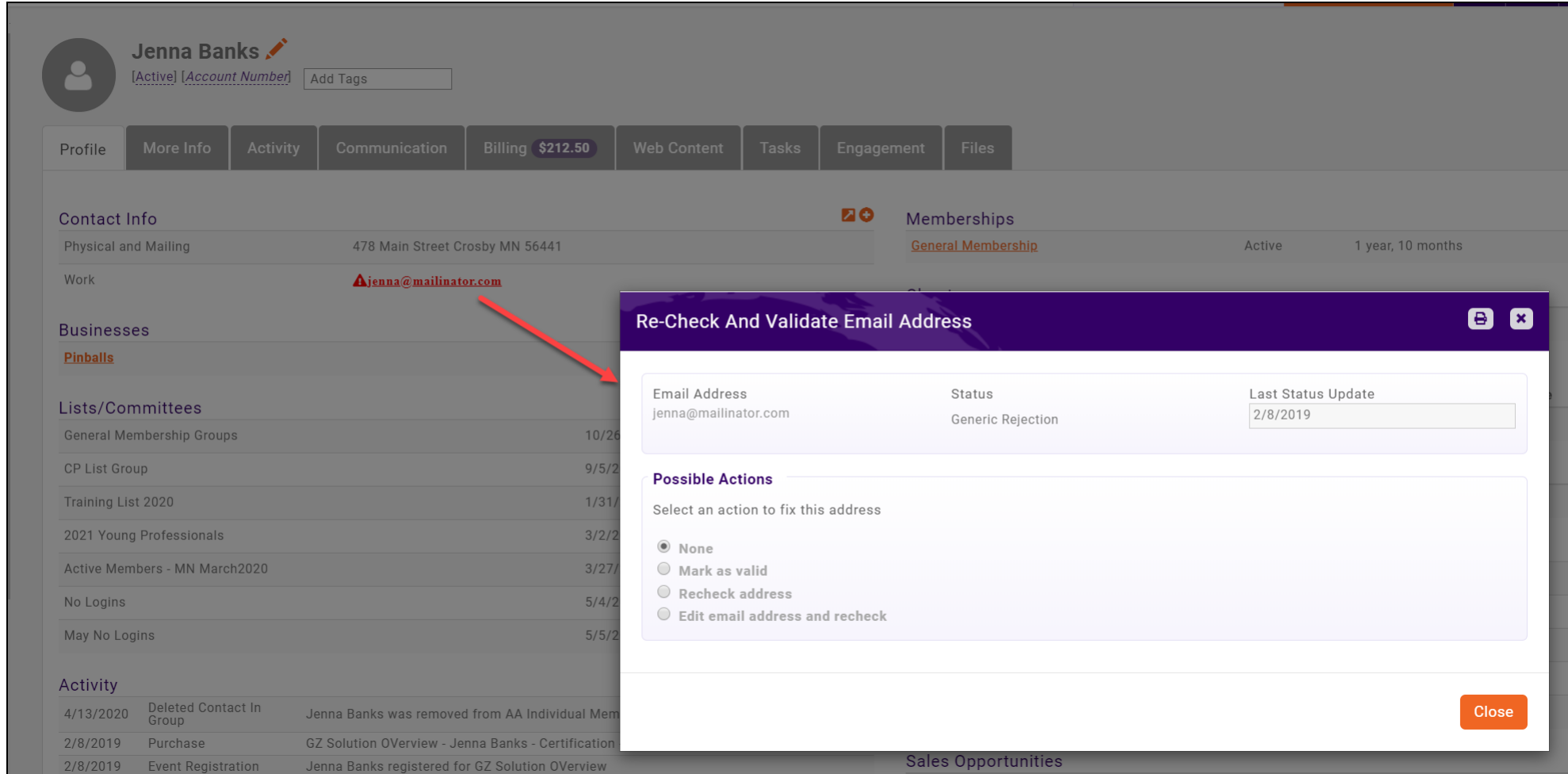
Results: 120

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Communication Subject	Email Address	Email Validity Status	Date Invalid	Contact Name	Contact Membership Status
2018 Floral Festival	danny@mailinator.com	Generic Rejection	1/23/2019 1:23:49 PM	Daniel McKay PHD	Active
2018 Floral Festival	ursula@mailinator.com	Generic Rejection	2/8/2019 3:00:28 PM	Door Stop Vet	Active
2018 Floral Festival	luisee@mailinator.com	Generic Bounce	1/23/2019 1:14:59 PM	Luisee Jones	Active
2018 Floral Festival	jenna@mailinator.com	Generic Rejection	2/8/2019 5:02:00 PM	Jenna Banks	Active
2018 Flower Festival - attendee registered	danny@mailinator.com	Generic Rejection	1/23/2019 1:23:49 PM	Daniel McKay PHD	Active
Billing Finance	ursula@mailinator.com	Generic Rejection	2/8/2019 3:00:28 PM	Door Stop Vet	Active
Billing Finance	danny@mailinator.com	Generic Rejection	1/23/2019 1:23:49 PM	Daniel McKay PHD	Active
Billing Finance	danny@mailinator.com	Generic Rejection	1/23/2019 1:23:49 PM	Deborah Mackay 123	Active

4...Review Your Failed/Invalid eMails

- Update/Correct eMail Addresses




The screenshot shows a user profile for Jenna Banks. The profile includes contact information, memberships, businesses, lists/committees, and activity. A red arrow points to the email address jenna@mailinator.com in the Work section, which is marked with a red warning triangle. A modal dialog titled "Re-Check And Validate Email Address" is open, displaying the email address, its status as "Generic Rejection", and the last status update date of 2/8/2019. The dialog offers four possible actions: None (selected), Mark as valid, Recheck address, and Edit email address and recheck. A "Close" button is located at the bottom right of the dialog.

Jenna Banks [Active] [Account Number] Add Tags

Profile More Info Activity Communication Billing \$212.50 Web Content Tasks Engagement Files

Contact Info

Physical and Mailing 478 Main Street Crosby MN 56441

Work  jenna@mailinator.com

Memberships

[General Membership](#) Active 1 year, 10 months

Businesses

[Pinballs](#)

Lists/Committees

Group Name	Start Date
General Membership Groups	10/26/2019
CP List Group	9/5/2019
Training List 2020	1/31/2020
2021 Young Professionals	3/2/2020
Active Members - MN March2020	3/27/2020
No Logins	5/4/2020
May No Logins	5/5/2020

Activity

Date	Action	Description
4/13/2020	Deleted Contact In Group	Jenna Banks was removed from AA Individual Mem
2/8/2019	Purchase	GZ Solution Overview - Jenna Banks - Certification
2/8/2019	Event Registration	Jenna Banks registered for GZ Solution Overview

Re-Check And Validate Email Address

Email Address	Status	Last Status Update
jenna@mailinator.com	Generic Rejection	2/8/2019

Possible Actions

Select an action to fix this address

- None
- Mark as valid
- Recheck address
- Edit email address and recheck

Close

5...Review & Update Group Participation

Review Un-subscribes





✓ If a contact un-subscribes from your group... what is your process?

Back to Lists/Committees

Training Email List

General Contacts Communication Events Files Import

Search... Customize Results... IncludePublicSubscriptions: True x [Clear All] Actions

First Name	Last Name	Organization	Email	Role	Join Date	Drop Date	Do Not Email	Is Internal Only	Actions
Harry	Potter		harry@mailinator.com		10/29/2019		Yes	No	
Shelly	Satre	Cheri's Sandboxes (INTERNAL)	shelly.satre@gmail.com		3/3/2020		Yes	No	
Joan	Jett	Joans	jett@mailinator.com		10/29/2019		No	No	
Marsha	Furry	Furry Friends	marsha@mailinator.com		10/29/2019		No	No	

Actions

Review Un-subscribes

- ✓ De-activate/Remove from Group?
- ✓ Leave in group – perhaps the contact simply wants to not receive your emails

You can use the [Unsubscribed Contacts Report](#) to review all un-subscribed, or review for each individual group

5...Review & Update Group Participation

Send an email to all group participants to specifically confirm that they wish to continue being a part of your group – some may not want to be, but have not unsubscribed















Prompt them to go to the un-subscribe link in your email

This might be a good time to update your un-subscribe message

WIKI: [Configure your Unsubscribe Opt-out Message](#)

Unsubscribe Settings

Unsubscribe Message

B *I* U  x_2 x^2 A ∇ T1 ∇             

This email was sent on behalf of {{ TCDisplayName }} located at {{ TCADDRAddress1 }}, {{ TCADDRAddress2 }}, {{ TCADDRCity }}, {{ TCADDRStateProvince }} {{ TCADDRPostalCode }}. [To unsubscribe click here.](#) If you have questions or comments concerning this email contact {{ TCDisplayName }} at {{ TCEmailAddress }}.

5

By routinely reviewing, correcting and updating your data, you can be confident that the information and reports provided to you by your system are accurate

Questions?