

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When you clean your data, all outdated or incorrect information is gone – leaving you with the highest quality information.

# 5 Year End Best Practices for a Healthy & Clean Database

1. Identify & Merge Duplicates
2. Update Member Status
3. Request that Members Review & Update their Information
4. Review & Update Community Member
5. Review & Update Group Participation

# 1...Identify & Merge Duplicates

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

What to do??? Merge!!!

# 1...Identify & Merge Duplicates

## Identify Duplicates

- Use the Custom Member report, include only Company Name
- Export to Excel,
- Use Excel functionality to highlight duplicates
  - Conditional Formatting > Highlight Cell Rules > Duplicates

41	Espresso Drive Thru			
42	Events by MS			
43	Fabulous Ferns			
44	Fabulous Ferns			
45	Faibanks True Value Hardware			
46	FirstPage Marketing			
47	Floral Design			
48	Franks Hotdogs			
49	Free Spirit Fitness			
50	FVCOC			
51	Get Pretty			
52	Gothams			
53	Grand Day Spa			
54	Great Breakfasts			
55	Great Breakfasts			
56	Greg's Donuts			
57	Gretna Example			
58	Hansons Construction			
59	Harry's			
60	Harry's Hair			

# 1...Identify & Merge Duplicates

## Merge Duplicates

- **Best Practice:** Merge the oldest record into the newest record
- You can make selections on some of the fields to be retained after the merge (name, address, etc.)
- For other fields (i.e. reps, billing history, communications) – all data is retained from both records

WIKI: [Merge Members](#)

**Member - Merge**

**Green River Clinic**

Only values that differ between the selected members will show up on the list below.  
Click on value you want to use for the final merged value from values for either **Green River Clinic** or **Green River Animal Clinic, Inc.** The currently selected value is highlighted in green.

After the merge is complete, please review Reps, Account, Advanced, and Marketing tabs to disable or delete any duplicate information if necessary.

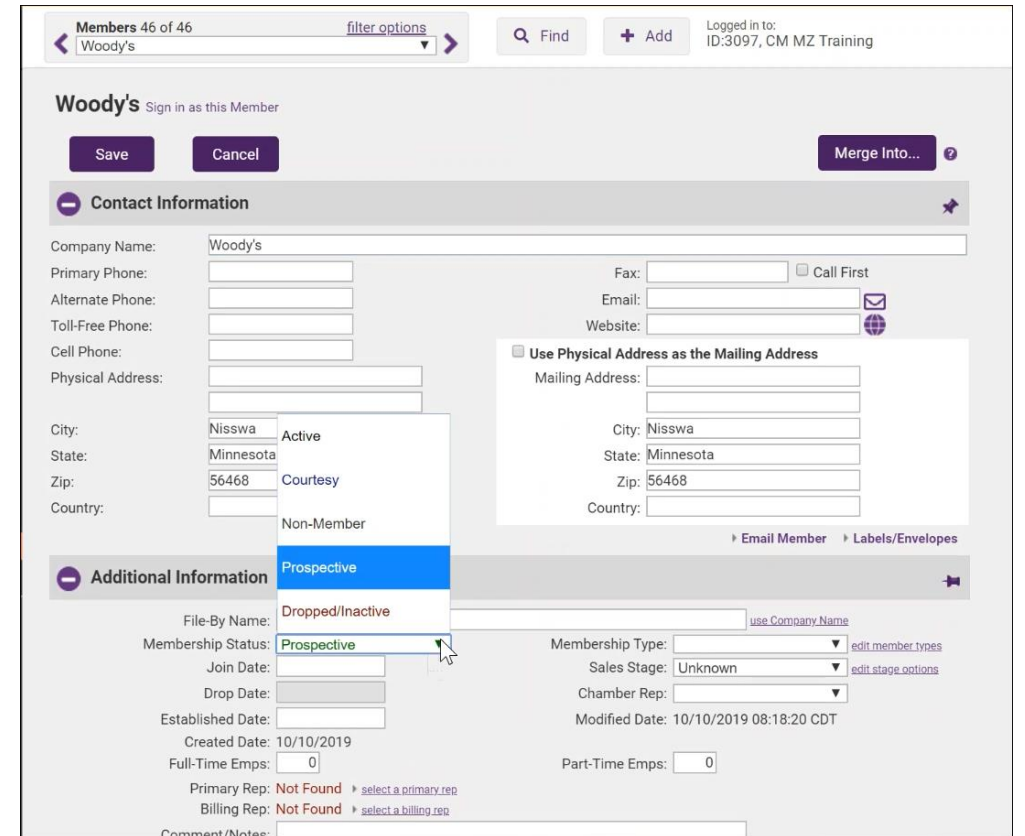
Field	Source Record Green River Clinic (Created: 9/29/2013)	Destination Record Green River Animal Clinic, Inc. (Created: 6/26/2012)	New Destination Record Merged Value
<b>Contact Fields</b>			
Company Name	Green River Clinic	Green River Animal Clinic, Inc.	Green River Animal Clinic, Inc.
Email		info@granimaklinic.comtest	info@granimaklinic.comtest
Fax		(555) 987-5213	(555) 987-5213
File-By Name	Green River Clinic	Green River Animal Clinic, Inc.	Green River Animal Clinic, Inc.
Mailing Address		✓	✓
Matches Physical			
Primary Phone	(555) 654-8798	(555) 987-6512	(555) 987-6512
<b>Physical Address Fields</b>			
Address Line 1		15090 Bleaverville Lane	15090 Bleaverville Lane
<b>Mailing Address Fields</b>			

## 2...Update Member Status

Do you have Prospects in your Database that will never become members, or vice versa, do you have Non-members in your database that should actually be Prospects?

Update your database to accurately reflect the status of your contacts, so that you have a true view of potential prospects, and can focus your energies on them

WIKI: [Change Member Status](#)



The screenshot displays the 'Woody's' member profile in the GrowthZone software. The interface includes a top navigation bar with 'Members 46 of 46', a search bar, and a 'Find' button. The profile is titled 'Woody's' with a 'Sign in as this Member' link. Below the title are 'Save', 'Cancel', and 'Merge Into...' buttons. The 'Contact Information' section contains fields for Company Name, Primary Phone, Alternate Phone, Toll-Free Phone, Cell Phone, Physical Address, City, State, Zip, and Country. A 'Use Physical Address as the Mailing Address' checkbox is also present. The 'Additional Information' section shows 'File-By Name', 'Membership Status' (set to 'Prospective'), 'Join Date', 'Drop Date', 'Established Date', 'Created Date', 'Full-Time Emps', 'Primary Rep', 'Billing Rep', and 'Comment/Notes'. The 'Membership Status' dropdown menu is open, showing options: Active, Courtesy, Non-Member, Prospective (highlighted), and Dropped/Inactive. The 'Membership Type' dropdown is set to 'Unknown', and the 'Sales Stage' dropdown is set to 'Unknown'. The 'Modified Date' is 10/10/2019 08:18:20 CDT.

## 2...Update Member Status

Use the Prospect Reports to see when you last communicated with a prospect... is it time to move on?

WIKI: [Prospect Communication Detail](#)

Prospects and Communication by Rep; Detail		
Rep:	(All)	Select All / Unselect All
Sales Stage:	(All)	Select All / Unselect All
Refresh Report		
1 of 1   Save as PDF Excel CSV		
Prospects & Communication Detail		
Rep	Lead	Days Since Contact
Cheri Petterson	Beautiful Home Remodeling	8
	Total: 1	Average: 8
Sheryl Rassler	ABC Construction	21
	Total: 1	Average: 21



### 3...Request that Members Review & Update their Information

Keeping your members records up to date can be time-consuming!

Your ChamberMaster/MemberZone database includes an email template, **Update Your Membership Listing**, that you can send to your members, requesting that they update their information via the MIC.

WIKI: [Send Email to Members to Update Contact Information](#)

Dear A Place for Dogs,

Changes happen. Have you updated your member information recently? You should be updating the Member Information Center at least every 3 months.

Your membership provides excellent opportunities for your organization to attract new customers and share information with our community, the region and even internationally. Don't frustrate your customers - make sure everyone has access to complete, up-to-date information!

**Important:** Completing your profile is critical to gaining increased visibility and exposure!

Take a few moments to review your information below and then access the online Member Information Center to make changes.

**Our Records:**

Company Name:	A Place for Dogs
Primary Phone:	(218) 546-5413
Physical Address:	21748 S Raider Court Winona, MN 55987
Mailing Address:	21748 S Raider Court Winona, MN 55987
Billing Contact:	Kase Brady
Billing Address:	Kase Brady 34 Main Street Nisswa, MN 56468
All Representatives:	Eric Allan Louis Armstrong Ben Bowman Krystal Bowman Kase Brady Chad Bring

## 4...Update Your Community Member

The Community Member record provides a special way to organize information for a person that has some association with your association – but is not associated with a member

Review your Community Member regularly to disable any reps who are no longer participating

WIKI: [Community Member](#)

Member Management

General

Reps

Web

Communication

Account

Stats

Advanced

Marketing

Files

Tasks

[Community Member]

[Sign in as this Member](#)

Save

Cancel

– List of Representatives

[filter options](#)

entries 1 - 8 of 8    Display 100    results per page.

	Company	Rep Name	Title	Status	Type	NAHB Membership	Phone	Email
<input type="checkbox"/>	<a href="#">A Place for Dogs</a>	<a href="#">Chandra Brady</a>		Inactive				<a href="#">chandra@mailinator.com</a>
<input checked="" type="checkbox"/>		<a href="#">Hannah Flannery</a>		Active	Primary			
<input type="checkbox"/>		<a href="#">Jennifer Flannery</a>		Active	Primary			<a href="#">flan@mailinator.com</a>
<input type="checkbox"/>		<a href="#">Laura Keasling</a>		Active	Primary			<a href="#">laura@rowlettchamber.com</a>
<input type="checkbox"/>		<a href="#">Mayala Lusi</a>		Active	Primary			<a href="#">luis@mailinator.com</a>
<input type="checkbox"/>		<a href="#">Tony Reese</a>		Active	Primary			<a href="#">reese@mailinator.com</a>
<input type="checkbox"/>		<a href="#">Lulu Tankson</a>		Active	Primary	Women's Council		<a href="#">lulu@mailinator.com</a>
<input type="checkbox"/>		<a href="#">Paula Yann</a>		Active	Primary			<a href="#">yann@mailinator.com</a>

[Send Email](#)

[Labels/Envelopes](#)

[Reassign Selected Reps](#)

[Remove/Inactivate Reps](#)

Add a New Rep

## 5...Review & Update Group Participation

- ✓ Create new groups each year
- ✓ Disable reps no longer participating
- ✓ Disable groups no longer needed

**Groups**

[Home](#) [General](#) [Roster](#) [Fees](#) [Sync](#) [Files](#)

### 2019 Ambassadors

Group Information

Group Name:

Group Type:

Status:

Description:

Date Group Formed:

Member Options:

- ☒ Allow members to view/search this group in Member Information Center. ?
- ☒ Allow members to join/leave this group within the Member Information Center.

Display in this section:

- ☒ Group Participation list ?
- ☐ Rep Interest list ?

Public Options:

- ☒ Allow the public to view this group roster at </groups/GroupRoster/2019-ambassadors-52> ? [Public page display settings](#)
- ☒ Allow the public to **join/leave** this group at </communication> ?

Additional Options:

- ☒ Display this group name on the **Email Subscriptions** opt-in/out page. ?
- ☐ Disable ability to opt-out from this groups' emails. (also overrides prior email opt-outs) ?
- ☐ Synch this group with Constant Contact. ?
- ☐ Display this group in "about" section of "Community App". (app required) ?

Group Members: [6 members](#)

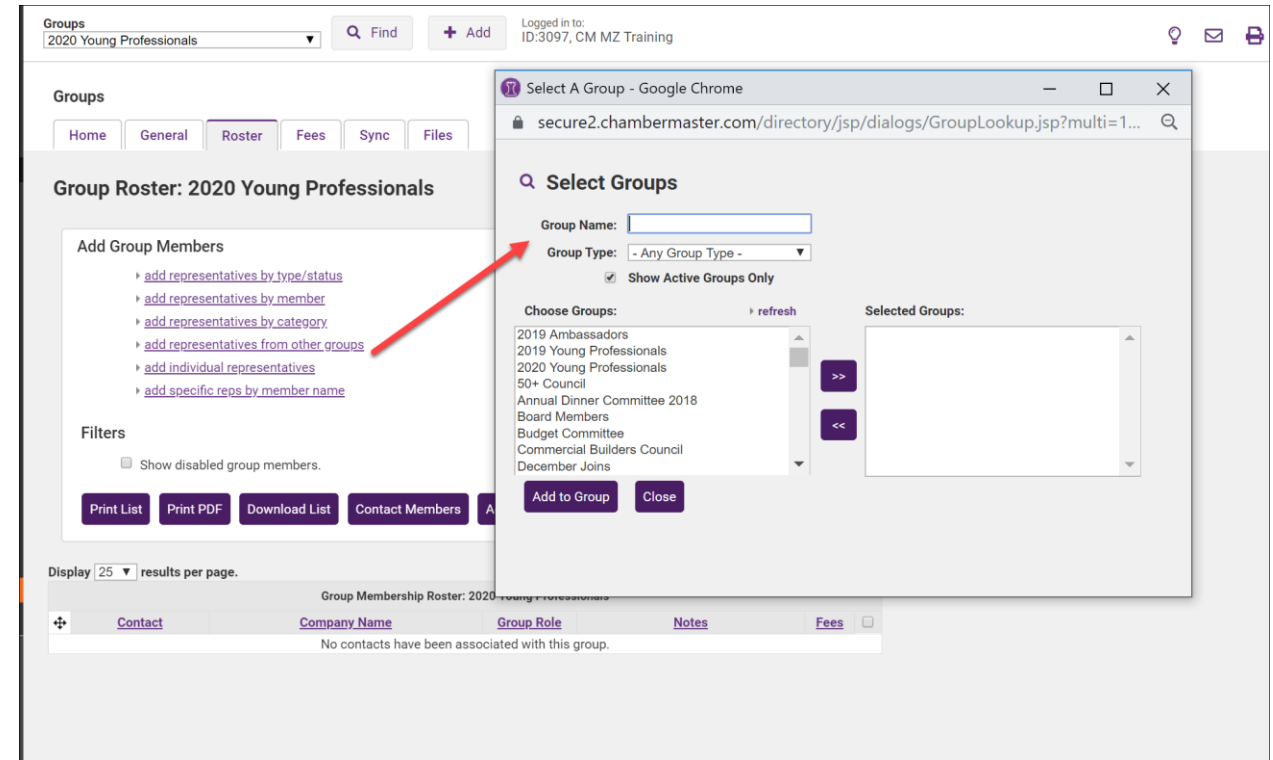
Outlook Email Alias: [2019-ambassadors](#)

[Save Changes](#) [Contact Members](#) [Cancel](#)

## 5...Review & Update Group Participation

Create new groups for the coming year

- While there is not a function to “copy” a group – if you have annual groups that may contain the some or all of the same reps, you can create a new group – then add reps to the new group by selecting



The screenshot displays the GrowthZone software interface. The main window shows the 'Group Roster: 2020 Young Professionals' page. A red arrow points from the 'Add Group Members' section to the 'Select Groups' dialog box. The dialog box is titled 'Select Groups' and contains the following fields and options:

- Group Name:** A text input field.
- Group Type:** A dropdown menu currently set to '- Any Group Type -'.
- ☒ **Show Active Groups Only**
- Choose Groups:** A list of groups with a 'refresh' button next to it. The list includes: 2019 Ambassadors, 2019 Young Professionals, 2020 Young Professionals, 50+ Council, Annual Dinner Committee 2018, Board Members, Budget Committee, Commercial Builders Council, and December Joins.
- Selected Groups:** An empty list box with '>>' and '<<' buttons for moving items between the two lists.
- Buttons:** 'Add to Group' and 'Close'.

The background page shows a table with columns: Contact, Company Name, Group Role, Notes, and Fees. The table is currently empty, with a message stating 'No contacts have been associated with this group.'

## 5...Review & Update Group Participation

Disable reps no longer participating in your groups

- ✓ Manage Unsubscribed Emails – this will provide you an understanding of those who have opted out of your group communication
- ✓ WIKI: [Manage Unsubscribed Emails](#)

### Member Contact Report


#### Filters

☐ Show Re-Subscribed addresses.

[Print List](#) [Manage Subscription](#)

Unsubscribed Addresses			
Address	Opt-Out Date	Type	Contact(s) Affected
<a href="mailto:cheri.petterson@growthzone.com">cheri.petterson@growthzone.com</a>	12/7/2018	Group: <a href="#">Volunteer Group</a>	<a href="#">The Tire Shop</a> <a href="#">Yanna Mars ()</a> <a href="#">Cheri Petterson</a> (A Place for Dogs <a href="#">Cheri Petterson</a> (Company Name
<a href="mailto:cheri.petterson@growthzone.com">cheri.petterson@growthzone.com</a>	3/21/2019	Group: <a href="#">Economic Development</a>	<a href="#">The Tire Shop</a> <a href="#">Yanna Mars ()</a> <a href="#">Cheri Petterson</a> (A Place for Dogs <a href="#">Cheri Petterson</a> (Company Name
<a href="mailto:gchavezlopez09@gmail.com">gchavezlopez09@gmail.com</a>	10/2/2019	Mass Emails	<a href="#">Gabriela's Designs and Styling</a>
<a href="mailto:mscanlan5@gmail.com">mscanlan5@gmail.com</a>	8/2/2017	Mass Emails	<a href="#">Espresso Drive Thru</a>
<a href="mailto:tenille@gmail.com">tenille@gmail.com</a>	8/2/2017	Mass Emails	


Display  results per page.

Group Membership Roster: Volunteer Group						
	Contact	Company Name	Group Role	Notes	Fees	
	<a href="#">Jean Fleury</a>	<a href="#">Henry's</a>		email: <a href="mailto:jfleury@mailinator.com">jfleury@mailinator.com</a>	60.00	<input type="checkbox"/>
	<a href="#">Johnny Jones</a>	<a href="#">The Bait Shop</a>		email: <a href="mailto:bjohnson@mailinator.com">bjohnson@mailinator.com</a>	60.00	<input type="checkbox"/>
	<a href="#">Henry LeMarc</a>	<a href="#">Henry's</a>		email: <a href="mailto:cheri.petterson@micronetonline.com">cheri.petterson@micronetonline.com</a>	60.00	<input type="checkbox"/>
	<a href="#">Harry Ruppert</a>	<a href="#">ABC Remodeling</a>		email: <a href="mailto:ruperts@mailinator.com">ruperts@mailinator.com</a>	60.00	<input type="checkbox"/>
	<a href="#">Rachel Stanford (inactive)</a>	<a href="#">Cooks4U</a>		email: <a href="mailto:rstanford@mailinator.com">rstanford@mailinator.com</a>	60.00	<input type="checkbox"/>
	<a href="#">Erik Remington</a>	<a href="#">Remingtons</a>		email: <a href="mailto:eremington@mailinator.com">eremington@mailinator.com</a>	60.00	<input type="checkbox"/>
	<a href="#">Frank Palla</a>	<a href="#">The Tai</a>		email: <a href="mailto:fpalla@mailinator.com">fpalla@mailinator.com</a>	60.00	<input type="checkbox"/>
	<a href="#">Cheri Petterson</a>	<a href="#">A Place for Dogs</a>		email: <a href="mailto:cheri.petterson@growthzone.com">cheri.petterson@growthzone.com</a> 	60.00	<input type="checkbox"/>

## 5...Review & Update Group Participation

- ✓ Review your group rosters for any reps who have opted out of your communications...  
opting out does not de-activate them from the group
- ✓ Ensure all reps are disabled (whether they have opted out, or simply are no longer participating in the group)
- ✓ WIKI: [Disable a Rep in a Group](#)

Display  results per page.

Group Membership Roster: Volunteer Group						
✚	Contact	Company Name	Group Role	Notes	Fees	<input type="checkbox"/>
☰	<a href="#">Jean Fleury</a>	Henry's		email: <a href="mailto:jfleury@mailinator.com">jfleury@mailinator.com</a>	60.00	<input type="checkbox"/>
☰	<a href="#">Johnny Jones</a>	The Bait Shop		email: <a href="mailto:bjohnson@mailinator.com">bjohnson@mailinator.com</a>	60.00	<input type="checkbox"/>
☰	<a href="#">Henry LeMarc</a>	Henry's		email: <a href="mailto:cheri.petterson@micronetonline.com">cheri.petterson@micronetonline.com</a>	60.00	<input type="checkbox"/>
☰	<a href="#">Harry Ruppert</a>	ABC Remodeling		email: <a href="mailto:ruperts@mailinator.com">ruperts@mailinator.com</a>	60.00	<input type="checkbox"/>
☰	<a href="#">Rachel Stanford (inactive)</a>	Cooks4U		email: <a href="mailto:rstanford@mailinator.com">rstanford@mailinator.com</a>	60.00	<input type="checkbox"/>
☰	<a href="#">Erik Remington</a>	Remingtons		email: <a href="mailto:eremington@mailinator.com">eremington@mailinator.com</a>	60.00	<input type="checkbox"/>
☰	<a href="#">Frank Palla</a>	The Taj		email: <a href="mailto:fpalla@mailinator.com">fpalla@mailinator.com</a>	60.00	<input type="checkbox"/>
☰	<a href="#">Cheri Petterson</a>	A Place for Dogs		email: <a href="mailto:cheri.petterson@growthzone.com">cheri.petterson@growthzone.com</a> 	60.00	<input type="checkbox"/>

# Questions?