

5 Steps to Get Your Database in Shape

Clean Up “Dirty Data”

1. Identify and merge duplicate data
2. Identify incomplete and/or inaccurate data
3. Stop collecting data you don't use
4. Review invalid emails
5. Review Membership Status



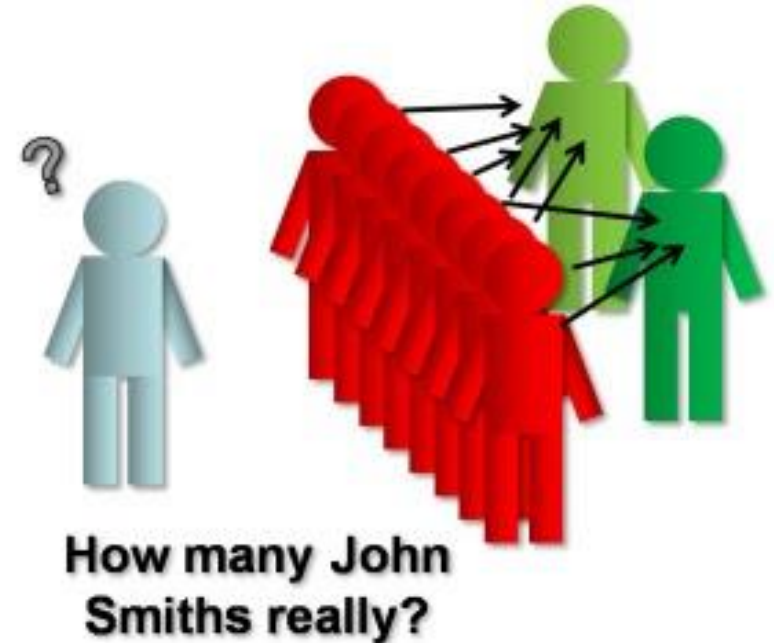
Signs of Dirty Data

- You need to look in different places for information
- You don't fully trust the numbers you see
- You can't understand your data
- Staff collect, store, and use data differently
- You wish you had information that you don't



1. Identify & Merge Duplicates


- How did duplicates get into your database in the first place?
 - No standardized procedure for how information is added to database
 - Staff not verifying records already exist before entering information
 - Membership Application submitted when Prospect already exists in database
 - Event Registrations not appropriately matched to existing contacts
- Establish specific guidelines for how data is entered into database



1. Identify & Merge Duplicates

• Custom Member Report

- Use to identify duplicate records in your database
- Use several pieces of identifying information in report
- Export to Excel
- Use the Excel Functionality to identify duplicates
 - Search by Company Name, Email Address, etc.



	A	B	C	D	E	F	G
19	Big Foot Shoe Shop	11/3/2022	11/3/2022 shoes@mailinator.com	5678 Portage	Big Foot		
20	Black Diamond Advertising	3/22/2018	3/22/2018 blackdiamond@mailinator.com	128 w 8th st	Colette Walters	Colette Walter	
21	Bobber Gifts	5/28/2019	5/28/2019 bobber@mailinator.com	P.O. Box 234	Jill Jones	Jill Jones	
22	Cakes by Katie	9/1/2022	11/3/2022 katiescakes@mailinator.com	657 First Street	Katie Cakes	Katie Cakes	
23	Car Dealership	11/11/2023	11/16/2023			Abi Normal	
24	Casino		1/24/2024 jack@mailinator.com			Jack Pott	
25	Clearview Window Repair		11/3/2022 windowrepair@mailinator.com				
26	Crystal Clear Window Washing	12/19/2023	12/19/2023 crystal@mailinator.com				Crystal Glass
27	Custom Cabinets	5/18/2012	9/15/2017 customcabinets@mailinator.com	65874 Cty Road 2	Shane Koglin	Shane Koglin	
28	Dana's Fashion Boutique	9/9/2022	9/9/2022 dana@mailinator.com	202 N Rose Street		Dana Jones	
29	Diephouse Realty	9/1/2022	12/5/2023 mwest@mailinator.com	1903 W. Michigan	Sarah Samuels	Sarah Samuels	
30	Dietrich Farms	1/2/2012	9/15/2017 dietrichfarms@mailinator.com	PO Box 46	Lloyd Caine	Lloyd Caine	
31	Dinah's Fireworks		5/30/2023 dmite@mailinator.com			Dinah Mite	
32	Discover Kalamazoo	9/1/2022	2/14/2023 discoverkalamazoo@mailinator.com			Lenny West	
33	Elizabeth's Creations		9/8/2022				
34	Emma's Kitchen	5/5/2022	3/21/2018 emmas@mailinator.com				
35	Emma's Kitchen		9/8/2022				
36	Furniture Store	5/5/2023	5/5/2023 furniture@mailinator.com				Patty O' Furnit
37	Gabby's Dry Cleaning	10/4/2022	10/4/2022 gabbydrycleaning@mailinator.com	9393 W. Michigan	Gabby Thomas	Gabby Thomas	
38	Gary's Guitars		4/3/2018 garysguitars@mailinator.com	143 Farmers Alley	Gary Johnson	Gary Johnson	
39	Happy Days Child Care	3/22/2018	3/22/2018 hdcc@mailinator.com	101 Main		Jane Smith	
40	Jane's Coffee Shop		2/24/2023			Jane Jameson	
41	Jane's Juice Joint		3/28/2023			Jane Smith	
42	Jannie Wille		3/22/2018				
43	Joe's Crab Shack		4/4/2018 joescrabshack@mailinator.com			Joe Shack	
44	Joel's Voice Lessons	5/5/2022	5/21/2018 joelvoicelessons@mailinator.com			Joel Full	
45	Josef's Bakery	2/10/2023	2/10/2023	70978 East Street	Josef Cakes	Josef Cakes	
46	Juice Joint		11/30/2022			Amy McKibbor	
47	Kalamazoo Animal Shelter		11/3/2022 kalamazooanimalshelter@mailinator.com				
48	Kalamazoo Aquarium		12/18/2023 maureen@mailinator.com			Maureen Biolo	
49	Kalamazoo Brewery Tours		9/29/2022 kzoobrewtours@mailinator.com			Alexander Smi	
50	Kalamazoo Candy Store	11/2/2022	11/2/2022 kzooocandy@mailinator.com	3456 W Main	Kalamazoo Candy		
51	Kalamazoo Coffee Shop		11/2/2022 kzooocoffee@mailinator.com	788 W Main Street	Kalamazoo		

1. Identify & Merge Duplicates

- Merge Duplicates
 - Best Practice: merge older record into newer record
 - Newer record usually has the most current data
 - Select data to retain for each field within record
- Administrator permission level required
- Merge cannot be undone
 - Ensure accuracy before merging

Member - Merge

Best Company

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 **Best Company** or **Best Company**. The currently selected value is highlighted in green.

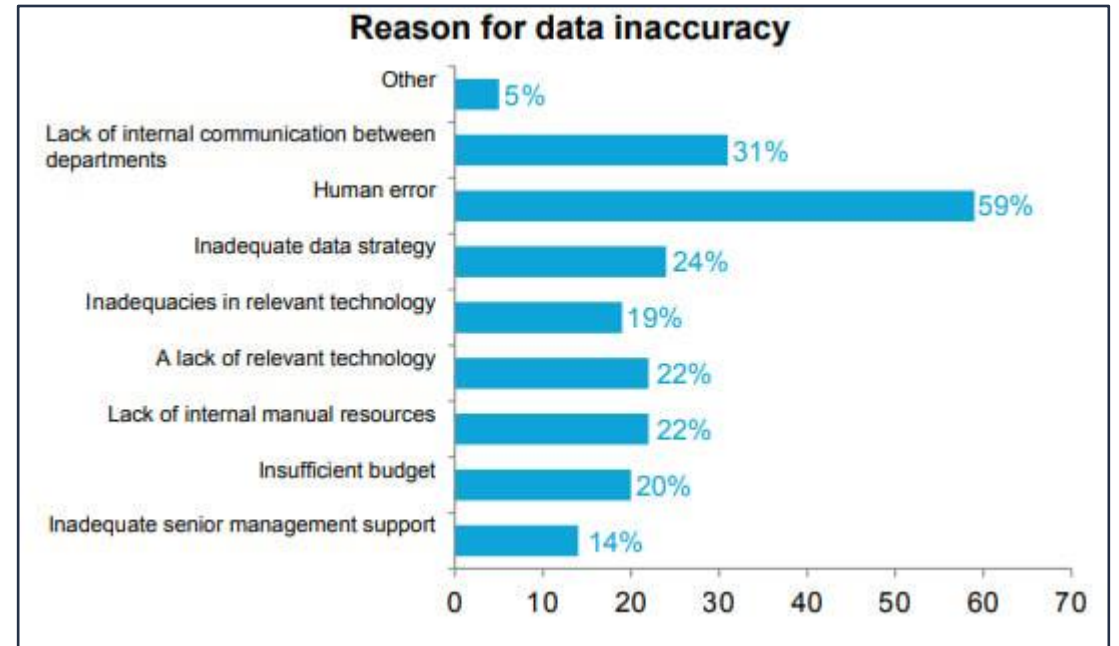
After the merge is complete, please use the Merge Selected Rep feature on the Reps tab to consolidate reps if needed. In addition, please review the Account, Advanced, and Marketing tabs to disable or delete any duplicate information if necessary.

Merge Cancel

	Source Record	Destination Record	New Destination Record
Field	Best Company (Created: 11/7/2017):	Best Company (Created: 9/26/2019):	Merged Value
Contact Fields			
Primary Phone	(604) 123-4567		
Physical Address Fields			
City	Baxter	Crosby	Crosby
Address Line 1	876 Graggre Lane		
Postal Code	87654	56441	56441
Mailing Address Fields			
City		Crosby	Crosby
Country	US		
Postal Code		56441	56441
State/Province		MN	MN
Display Fields			
Display Primary Phone	(604) 123-4567		
Lodging Vacancy Service	None	ChamberMaster	ChamberMaster

2. Identify Incomplete/Inaccurate Data

- Use your reports to find missing data in your database
 - Information needed to interact with members
 - Information important to providing great member experience
 - Information needed for board reports
 - Information needed for event invitations



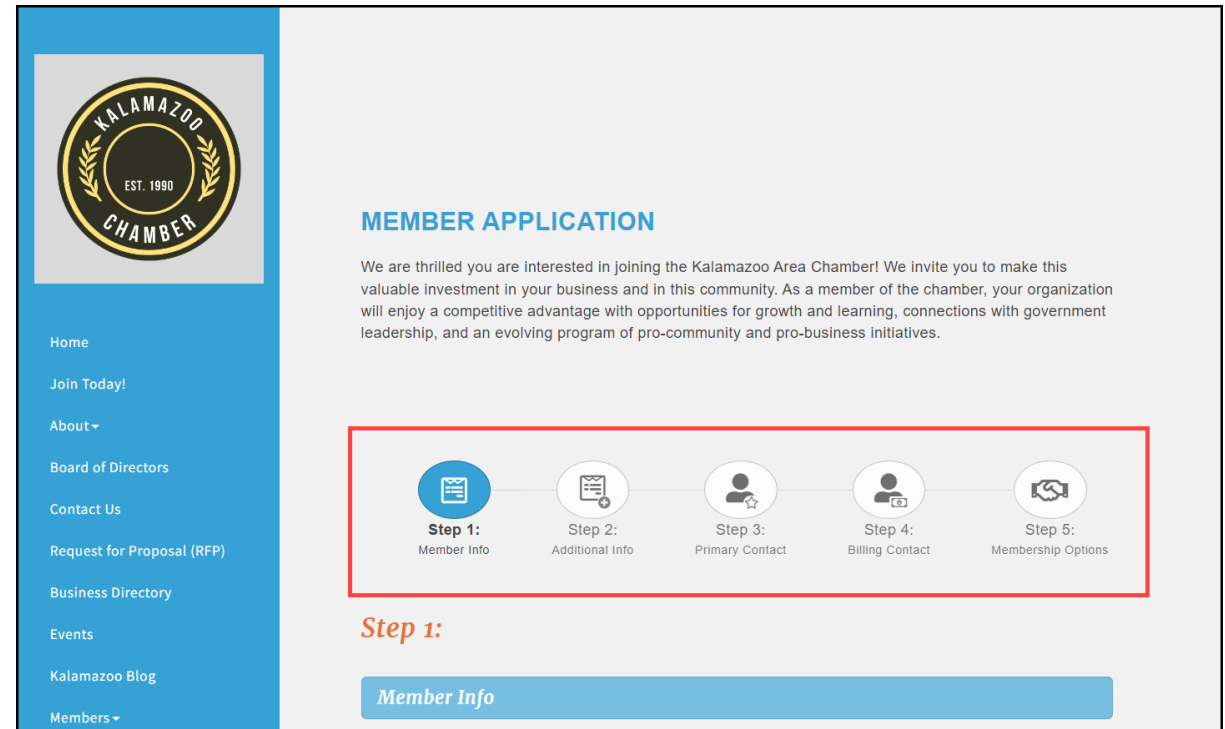
2. Identify Incomplete/Inaccurate Data

- Use Custom Member Report
 - Helps identify missing data
- Create Custom Member Report with necessary fields and save to use for regular database cleanup
 - Run on regular basis (monthly, quarterly, etc.)

CP Billing Contact Info		
Company Name	Billing Contact	Billing Email
A & T Baseball	Skinny Harold	skinny@mailinator.com
A Place for Dogs	Shannon Jones	cheri.petterson@growthzone.com
abcd		
Acorns	Wally Main	
Addams and Sons	Mark Addams	
Alex Race Track Events LLC		
Beautiful Home Remodeling	Peter Mays	cheri.petterson@growthzone.com
Best Company	Joan Larsen	
Cakes by Stefani		stefan@mailinator.com
Cheri's Dog Boarding	Cheri Test	
Chewy Chewy	Lance Chewy	chewchew@mailinator.com
Danico's	Tony Danico	
Dogs R' Us		loisl@mailinator.com
Fanron Realty Group		
Fayette Store	Jane Breyer	breyer@mailinator.com
Floyd's Windows		
Flutists	Jerry Flute	jerryf@mailinator.com
Frank's Pitstop	Greg Hales	marks@mailinator.com
Gabriela's Designs and Styling	Gabriela Chavez-Lopez	
Golf Tournament Non-Member	John Jacobs	
Grant's	Grant Lance	
Green Building Builders		
Henry's	Henry LeMarc	cheri.petterson@micronetonline.com
Herb's Herb House		
hi		
Horses are Us		
House of Cards	Joe House	
I Like it Shiny		diamondsareagirlsbestfriend@gmail.com

2. Identify Incomplete/Inaccurate Data

- Follow procedure for adding a new member record
- If using the Membership Application, ensure you're gathering the essential information needed for a complete record
 - Use Custom Fields to gather pertinent information



KALAMAZOO CHAMBER
EST. 1990

Home
Join Today!
About ▾
Board of Directors
Contact Us
Request for Proposal (RFP)
Business Directory
Events
Kalamazoo Blog
Members ▾

MEMBER APPLICATION

We are thrilled you are interested in joining the Kalamazoo Area Chamber! We invite you to make this valuable investment in your business and in this community. As a member of the chamber, your organization will enjoy a competitive advantage with opportunities for growth and learning, connections with government leadership, and an evolving program of pro-community and pro-business initiatives.

Step 1: Member Info
Step 2: Additional Info
Step 3: Primary Contact
Step 4: Billing Contact
Step 5: Membership Options

Step 1:

Member Info

2. Identify Incomplete/Inaccurate Data

- Set a regular cadence to remind your members to update their profile information
 - [How Do I Get Chamber Members to Update Their Information?](#)
- Use the [Update your Membership Listing](#) email template
 - Quickly determine if information is accurate
 - Link to [MIC](#) to change anything that needs updating

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 Jack Jones Mark Kilton

Who can make changes?

- Member Record Updates report

- Displays changes made to member record
- Good troubleshooting first step
 - Filter to specific date range, member, or change type
- Can download report to use Excel functionality

The screenshot shows the Chambermaster PRO web interface. On the left is a dark sidebar with navigation links: Dashboard, Members, Groups, Communication, Events, Jobs, Advertising, MarketSpace, News Releases, Info Request, Billing, Reports, Cloud Drive, Form Builder, eCommerce, Project/Task, Setup, Account, Training, Support Help/Wiki (highlighted), and a Linked Account. Below these is a Task List with counts for various items like Mbr Signups, Hot Deals, etc. The main content area is titled 'Reports' and contains a 'Member Update Activity' section. This section has a 'Filter Options' box (highlighted with a red rectangle) with fields for Member (a dropdown), From/To dates (set to 9/28/2023), Change Type (a dropdown), and Changed by (a dropdown). There is a 'Refresh Listing' button and a 'Clear Filters' link. Below the filters, a note states: 'Dates listed below are based on the date recorded on the Central time zone server (GMT-06:00)'. The report shows 'entries 1 - 7 of 7' with 'Display 10 results per page'. The report table has columns: Member Name, Field Changed, Old Value, New Value, Date Changed, and Changed By. It lists seven updates for 'Anne's Antiques', including changes to RepFirstName, RepLastName, RepEmail, RepContactPref, RepIsPrimary, RepIsBilling, and MemNew. A 'Need Help?' button is on the right. At the bottom of the report are 'Print' and 'Download' links.

Member Name	Field Changed	Old Value	New Value	Date Changed	Changed By
Anne's Antiques	RepFirstName		Anne	9/28/2023 - 12:30PM	Elizabeth Diephouse
Anne's Antiques	RepLastName		Teak	9/28/2023 - 12:30PM	Elizabeth Diephouse
Anne's Antiques	RepEmail		ateak@mailinator.com	9/28/2023 - 12:30PM	Elizabeth Diephouse
Anne's Antiques	RepContactPref	email		9/28/2023 - 12:30PM	Elizabeth Diephouse
Anne's Antiques	RepIsPrimary	: false	Anne Teak: true	9/28/2023 - 12:30PM	Elizabeth Diephouse
Anne's Antiques	RepIsBilling	: false	Anne Teak: true	9/28/2023 - 12:30PM	Elizabeth Diephouse
Anne's Antiques	MemNew		Anne's Antiques	9/28/2023 - 12:30PM	Elizabeth Diephouse

3. Stop Collecting Data You Don't Use

- You never want to collect data you don't use
 - Do you use all the demographic data you collect?
 - Custom Fields for Members, Reps, Events, Groups, etc.
- Disable Custom Field
 - Maintain data collected without further clogging up your database
 - Keep custom field for use in the future

Custom Field Information
Kalamazoo Area Chamber

Member ▼

Drag rows to change the display order of the fields.

Field Name	Field Type	Field Size	MIC Search	Member Permission	
General					
Why did you join?	Select	edit items	<input checked="" type="checkbox"/>	Read Only	<input type="checkbox"/>
Would you like a ribbon?	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Are you willing to host a	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Would you like to volun	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Number of Employees	Select	edit items	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Referred by	Text	50	<input type="checkbox"/>	Read/Writ	<input type="checkbox"/>
When is your birthday?	Date	N/A	<input checked="" type="checkbox"/>	Read Only	<input type="checkbox"/>
Business District	Select	edit items	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
What industry are you i	Text	100	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Ownership					
Family Owned?	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Minority Owned?	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Veteran Owned?	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Women Owned?	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Local Small Business	Select	edit items	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Are you a legally certifi	Boolean	N/A	<input checked="" type="checkbox"/>	Read/Writ	<input type="checkbox"/>
Prospective Member Information					
Source How did you he	Select	edit items	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Sales Temperature	Select	edit items	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Rating	Numeric: Integer	N/A	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Date Added to Pipeline	Date	N/A	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Stage in Sales Process	Select	edit items	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Close Date	Date	N/A	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Forecasted Month	Select	edit items	<input type="checkbox"/>	Disabled	<input type="checkbox"/>
Dues Amount	Numeric: Decimal	N/A	<input type="checkbox"/>	Disabled	<input type="checkbox"/>

[Add A Field](#) [Add A Section Heading](#) [Remove Selected Fields](#)

[Save & Exit](#) [Close](#)

Custom Field Report

- Not Recommended:
Remove Custom Field
 - Deletes responses and data
- Run Custom Member Report or Custom Rep Report before deleting
- Save report to keep historical data

The screenshot shows the 'chambermaster PRO' interface. On the left is a sidebar with navigation links: Dashboard, Members, Groups, Communication, Events, Jobs, Advertising, MarketSpace, News Releases, Info Request, Billing, Reports (highlighted), Cloud Drive, Form Builder, eCommerce, Project/Task, Setup, Account, Training, Support Help/Wiki, and Linked Account. The main content area is titled 'Reports' and 'Representative Listing'. It includes a 'Saved Reports (optional)' section with a dropdown menu set to 'Load A Saved Report: - Choose One -' and a 'Delete Selected Report' link. Below this is the 'Fields Reported' section, which has two columns: 'Available Fields' and 'Selected Fields'. The 'Available Fields' list includes links for 'Rep Personal Information', 'Rep Contact Information', 'Member Contact Information', 'Member Information', 'Custom Rep Fields' (highlighted with a red box), and 'Custom Member Fields'. The 'Custom Rep Fields' section contains five checkboxes: 'Would you like a Chamber Mentor?', 'Interested in Continuing Education courses?', 'Would you be interested in hosting a Board of Directors Meeting?', 'Business District', and 'Meal Choice for Events'. The 'Selected Fields' column is currently empty, with 'Primary Sort' and 'Secondary Sort' dropdown menus below it. A 'clear fields' button is located to the right of the 'Selected Fields' list. At the bottom of the 'Available Fields' section is a 'Continue' button. The top right of the interface shows the user is logged in as 'ID:3162, Kalamazoo Area Cha...' with various utility icons and a 'MIC' label.

4. Review Invalid Email Addresses & Update

- Invalid emails prevent you from communicating with members
 - Also impacts your sender reputation
 - Maintain clean email lists
- Quarantined Invalid Email Addresses Report
 - Use to view emails marked as invalid
 - View Quarantine Reasons

Member Status: Do Not Filter by Member Status ▾
Quarantine Status: All ▾
Details: Off ▾
Refresh Report

1 of 1 | Save as Excel CSV

Invalid Email Addresses

Chambermaster Memberzone

Emails Quarantined: 5

Action	Email	Quarantine Reason	Quarantine Date	Mem ID	Member
Re-Check Change MarkAsGood	info@XYZ.COM	Rejected email; SMTP server rejected email; the email account doesn't exist	7/28/2019	36	XYZ General Store
Re-Check Change MarkAsGood	jjones@diephouserealty.com	No MX Record; MX record of the domain doesn't exist.	10/21/2022	124	Diephouse Realty
Re-Check Change MarkAsGood	mwest@diephouserealty.com	No MX Record; MX record of the domain doesn't exist.	10/11/2022	124	Diephouse Realty
Re-Check Change MarkAsGood	s@stacey.com	No MX Record; MX record of the domain doesn't exist.	7/28/2019	16	MicroMachines of West M
Re-Check Change MarkAsGood	sam@maillinator.com	No MX Record; MX record of the domain doesn't exist.	7/28/2019	40	Tie Dye Designs


Will Be Quarantined: 1

Action	Email	Quarantine Reason	Planned Quarantine Date	Mem ID	Member
Re-Check Change Quarantine Tonight	crystal@maillinator.com	Invalid email address; may contain invalid characters or is incomplete	2/23/2024	127	Crys

1/30/2024 3:56:49 PM

5. Ensure Members Are Accurately Organized

- Do members have the appropriate Membership Status?
 - Active
 - Dropped/Inactive
 - Courtesy
 - Non-Member
 - Prospect
- Ensures true representation of Prospective Members
 - Focus your efforts
- Prospects and Communication by Rep: Detail Report
- Custom Member Report

 Prospects & Communication Detail		
Rep	Lead	Days Since Contact
Andrew Lewis	Emma's Kitchen	12
	Kalamazoo Brewery Tours	19
	Total: 2	Average: 15
John Thompson	Kalamazoo Coffee Shop	51
	Total: 1	Average: 51
John-Jacob Jingleheimer-Schmidt	Juice Joint	14
	Total: 1	Average: 14
Mary West	Elizabeth's Creations	16
	Total: 1	Average: 16
Sandra Dee	Custom Cabinets	19
	Pedal Bike Shop	12
	Total: 2	Average: 15

Guide to Maintaining a Clean & Healthy Database



IDENTIFY DATA
REQUIRING THE
MOST ATTENTION



CREATE A PLAN



CLEANSE YOUR
DATA



INSTITUTE
BUSINESS RULES

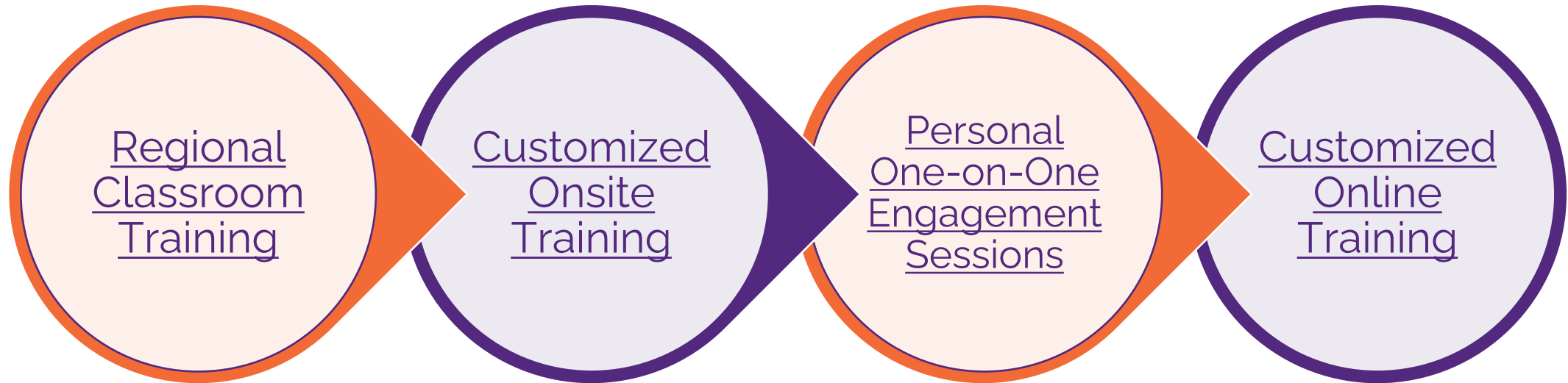


SCHEDULE
REGULAR DATA
CLEANUP

Training Resources



Expanded Training Offerings



Questions?