Data Cleanup Tips

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Contact Cleanup

TIP: Donor CRM has easy to use reports that allow you to quickly search and identify duplicate records. To learn more, **click here**.

- Make sure all contacts and gift records have a matching ID (Donor_ID) as this is how the gift will be associated with the contact record. The Donor_ID is typically numeric, for example if you had 1,000 donors the Donor_ID would range from 1 to 1000.

  Note: It is OK to have gaps in the numeric sequence or even alphabetical characters- what matters is that each Donor_ID is unique to that donor in the CSV file.

- Remove duplicate contact records and ensure you keep the most up-to-date information.

  Hint: Don't forget to look for abbreviated or nicknames during this process.

- Remove any outdated or bad addresses from contact records.
- Identify your records as either Individual or Organization ("I" or "O") in the Contact_Type field.
- If there are multiple phone numbers, label them as home, mobile or business.
- Remove data (delete the columns) from your contact records that you no longer need. If you only have a small percentage of data for a field, i.e. Maiden Name, then it's best to put that information into the Notes field.

Note: There are three required fields for importing any data: Donor ID, Last Name, and Address1.

Transaction Cleanup

TIP: Donor CRM has easy to use reports that allow you to quickly search and identify duplicate transactions. To learn more, **click here**.

- Provide the general ledger name for each gift record. This field answers the question, “Where is this money going to? What will this money be used for?” Typically this will match your Chart of Income Accounts your nonprofit accountant uses to track your funds.
    - Examples may include Restricted Funds, Unrestricted Funds, General Operating Budget, Capital Campaign. The full name of the Fund can be used, as abbreviations are not necessary.
- Provide the solicitation method name for each gift record. The solicitation method answers the question, “Why is this person giving us money? What is this money in response to?”
    - Examples may include Direct Mail, Email, Fall Gala, End of Year Mailing, etc.
- **(Optional)** Provide the campaign names for each gift record. A Campaign is made of one or many Solicitation Methods.
    - Examples may include Annual Campaign, Capital Campaign 22-25, Fall Events, etc.
- Indicate if the donor has been thanked for each gift listed by making sure the TY_DATE field has a valid date.
    - One way is to make sure the TY_DATE field is the same as the Gift Date field.