

Altru Master's Workshop



Tips & Tricks for
Constituent Record Maintenance
Wednesday, September 24, 2014

Objectives

Upon completion of this class, you will be able to:

1. Understand the concept of Record Maintenance
2. Identify and update
 1. Incorrect address records
 2. Individuals missing a title
 3. Individuals missing a gender
3. Merge two known duplicate records
 1. Review Merge Configurations
 2. Review the merged record



Agenda

- Define and discuss Record Maintenance
- Run a query to isolate erroneous addresses, missing titles, and genders
- Discuss how to use the query browse function
- Correct erroneous data
- Re-run queries to confirm corrections
- Define and discuss duplicate records
- Merge two known duplicates together

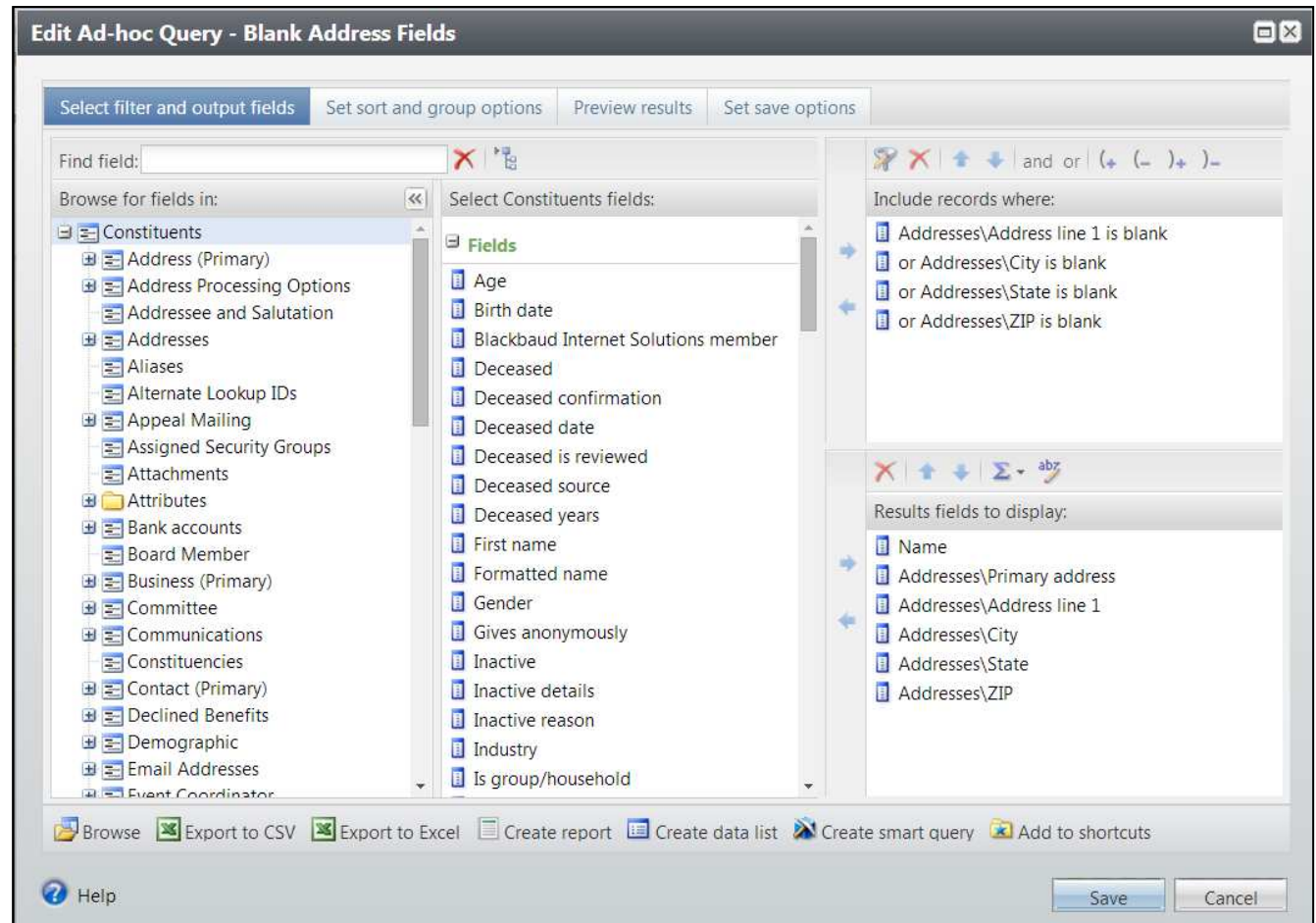


What is Record Maintenance?

- Data is entered in Altru by human beings with the best of intentions – but we make mistakes.
- Over time the Altru database develops a pool of records that do not accurately reflect the people and organizations they represent.
- Inaccurate records impact the accuracy and reliability of lists, reports, and queries
- **Record Maintenance** is the process of locating and correcting these errors to ensure that the data is accurate and trustworthy.

Use a query to identify errors in address records

- This query retrieves any address with one or more blank fields
- Clean up the records until this query retrieves zero records.



Use a query to identify errors in address records

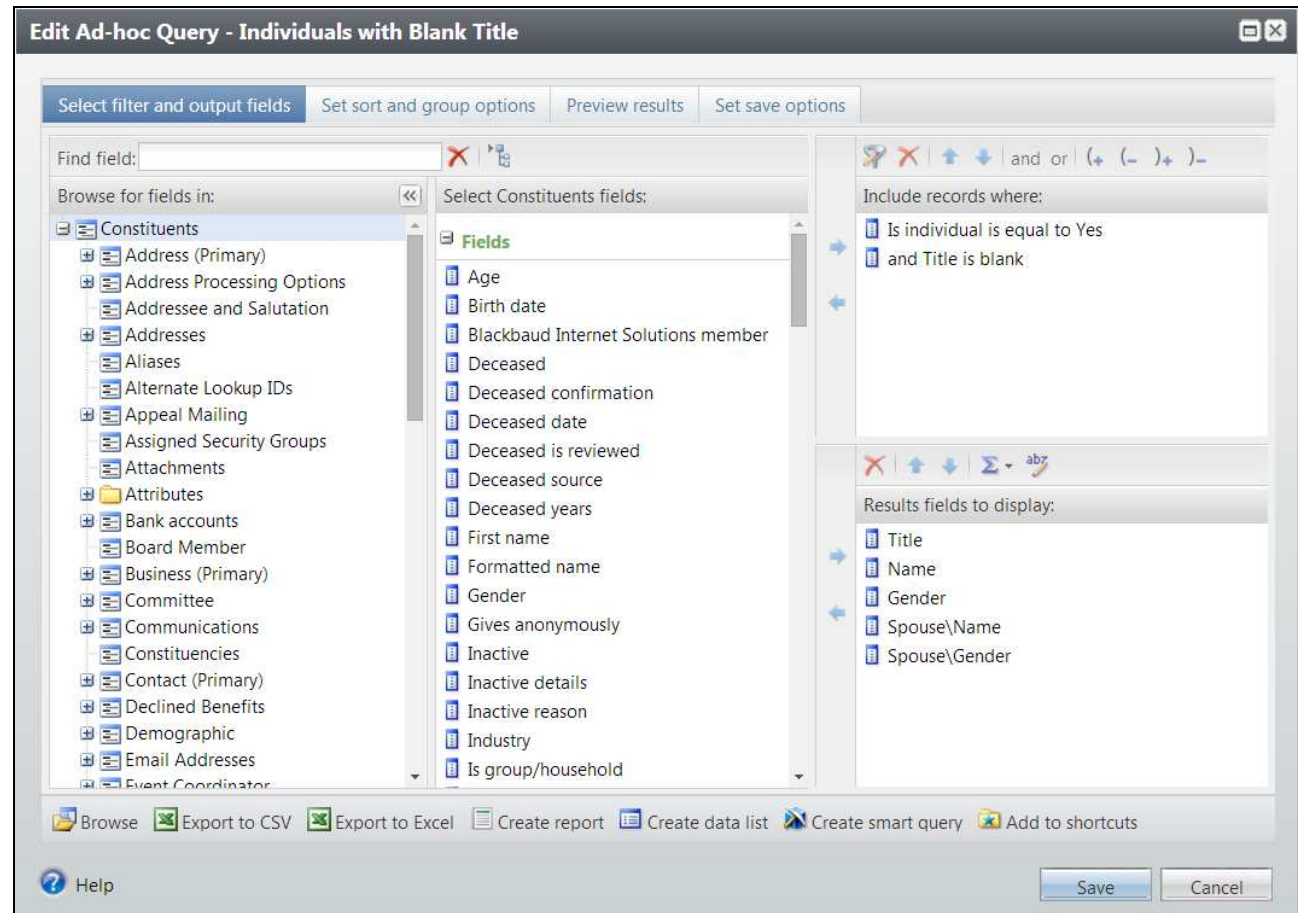
- Click “Browse” to view the results of the query and select “Constituent Page”
- Edit the address of the Constituent in the top of the screen.
- Press “Next Record” or double-click a row to move to the next Constituent and address to be fixed.

The screenshot displays the Altru CRM interface. At the top, there is a navigation bar with various menu items like Home, Constituents, Marketing and Communications, etc. The main content area shows the profile for Jane Doe, including personal information, contact information, and primary relationships. The 'Addresses' section is highlighted with a red box. Below the profile, there is a 'Browse query results (380 records found)' section. In this section, the 'Next record' button is highlighted with a red box, and the row for Jane Doe is highlighted with a red box, with a red arrow pointing to her name.

Name	Addresses\Primary address	Addresses\Address line 1	Addresses\City	Addresses\State	Addresses\ZIP
Nicholas Sparks	Yes	797 main st	denver	Colorado	
Blackbaud	Yes				
Jane Doe					
Sarah Lithgow					
Jason Sears					
Ronald Whittingham	No				46385

Use a query to identify missing titles

- This query retrieves any Individuals with no Title
- Clean up the records until this query retrieves zero records.



Use a query to identify missing titles

- Click “Browse” to view the results of the Query and select “Constituent Page”
- Edit the title on the Personal Info tab.
- Press “Next Record” or double-click a row to move to the next Constituent title to be fixed.

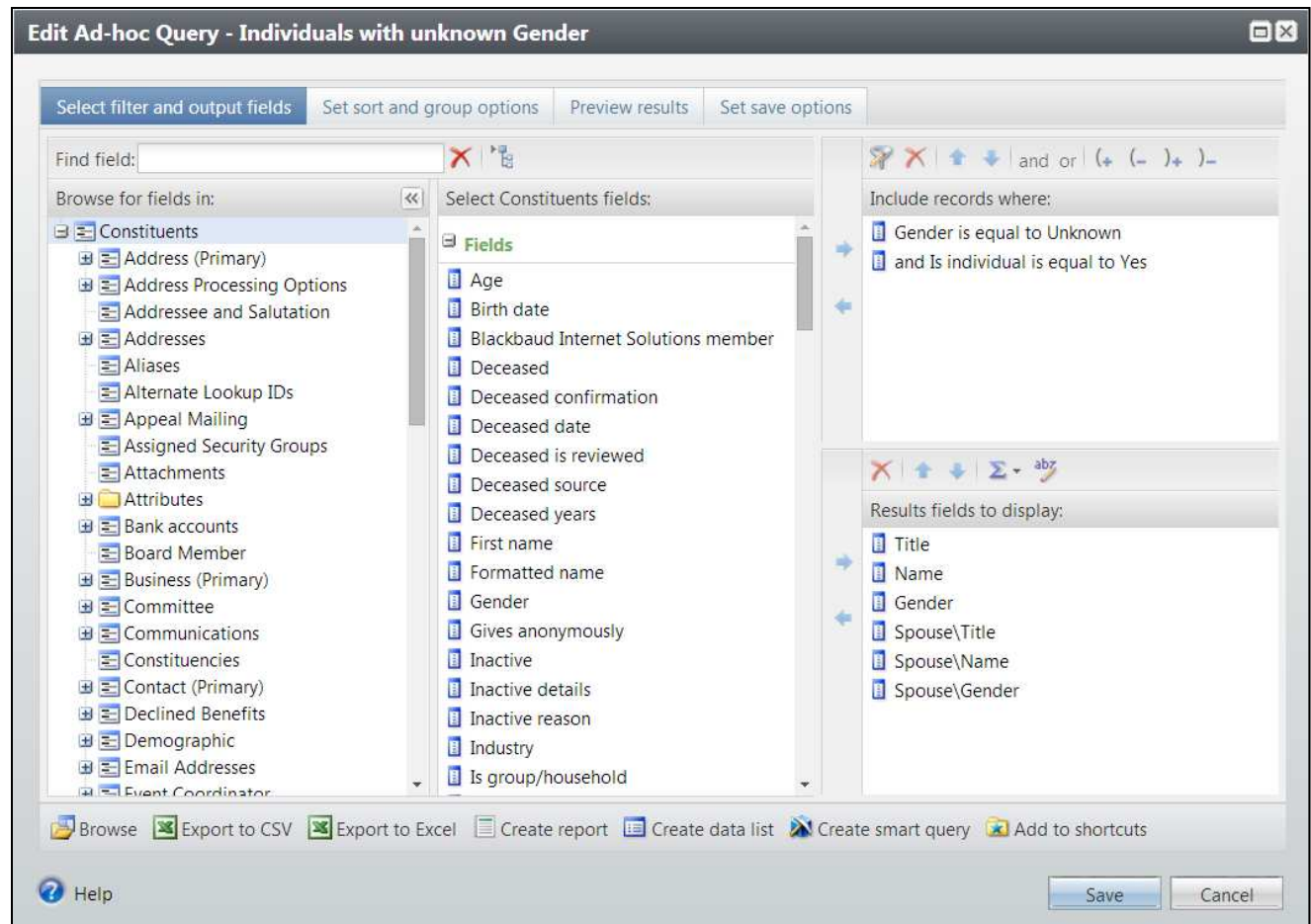
The screenshot displays a CRM interface with a sidebar on the left containing 'Reports' and 'Shortcuts'. The main area shows the 'Personal Info' tab for a constituent named Justine Wakeland. The 'Title' field is highlighted with a red box, and a red arrow points to the 'Edit' button. Below this, a 'Browse query results' window shows a table of 360 records. A red arrow points to the first row of the table, which is highlighted. The table has columns for Title, Name, Gender, Spouse\Name, and Spouse\Gender.

Title	Name	Gender	Spouse\Name	Spouse\Gender
	Justine Wakeland	Female		
	Ryan Mills	Male		
	Roger Rabbit	Male		
	Guenter Schmidt	Male		
	Robert Wooley	Male		

- **Pro-Tip: you can rearrange your tabs in Constituent records to make the Personal Info tab and Personal subtab, the default view that is opened to directly for a constituent – just drag and drop the tabs.**

Use a query to identify Individuals with an Unknown Gender

- This query retrieves any Individuals with a Gender of “Unknown”
- Clean up the records until this query retrieves zero records.



Use a query to identify Individuals with an Unknown Gender

- Click “Browse” to view the results of the Query and select “Constituent Page”
- Edit the Gender on the Personal Info tab.
- Press “Next Record” or double-click a row to move to the next Constituent title to be fixed.

The screenshot displays a CRM interface with a sidebar on the left containing 'Reports' and 'Shortcuts'. The main area shows a 'Personal information' tab for a constituent named William Voyles. A red arrow points to the 'Personal Info' tab in the top navigation bar. Below the personal information, a table titled 'Browse query results (87 records found)' is shown. A red arrow points to the 'Gender' column in the table, which contains the value 'Unknown' for the first record.

Title	Name	Gender	Spouse\Title	Spouse\Name
	William Voyles	Unknown		Penelope Voyles
	MaryAnne Esparza	Unknown		
	Henna Suro	Unknown		Joe Suro
	grow	Unknown		
	test	Unknown		

- **Pro-Tip: Try variations of this Query, like “Gender is male and Title is Mrs, Ms, or Miss” and “Gender is female and title is Mr.”**

Time Saving Tip

- Create a folder in the Information library to store your record maintenance queries.

The screenshot shows the Altru Information library interface. The top navigation bar includes 'Home', 'Constituents', 'Marketing and Communications', 'Revenue', 'Sales', 'Events', 'Memberships', 'Volunteers', 'Fundraising', 'Treasury', and 'Financials'. The main content area is titled 'Information library' and has tabs for 'Queries' and 'KPIs'. On the left, there is a 'Manage folders' section with a 'View by: Folder' dropdown. The folder list includes 'Favorites (1)', 'All queries (121)' (with sub-items '<none> (117)' and 'Test (1)'), and 'Record Maintenance (3)', which is highlighted with a red box. The main area displays a table of queries under the heading 'Queries (3)'. The table has columns for Name, Folder, Owner, Created on, and Last run on. The queries listed are 'Blank Address Fields', 'Individuals with Blank Title', and 'Individuals with unknown Gender', all belonging to the 'Record Maint...' folder and owned by 'BBU\BBTrain25'.

Name	Folder	Owner	Created on	Last run on
★ Blank Address Fields	Record Maint...	BBU\BBTrain25	8/7/2014	8/7/2014
★ Individuals with Blank Title	Record Maint...	BBU\BBTrain25	8/7/2014	8/12/2014
★ Individuals with unknown Gender	Record Maint...	BBU\BBTrain25	8/7/2014	8/7/2014

Merging two known duplicate Constituents




Merging two known duplicate Constituents

Constituents
Duplicates

Duplicate constituent search pro... Merge constituents processing

- Full duplicate search
- Incremental duplicate search

- Duplicate constituent report
- Constituent merge
- Merge two constituents
- Merged constituent search



Constituent Merge

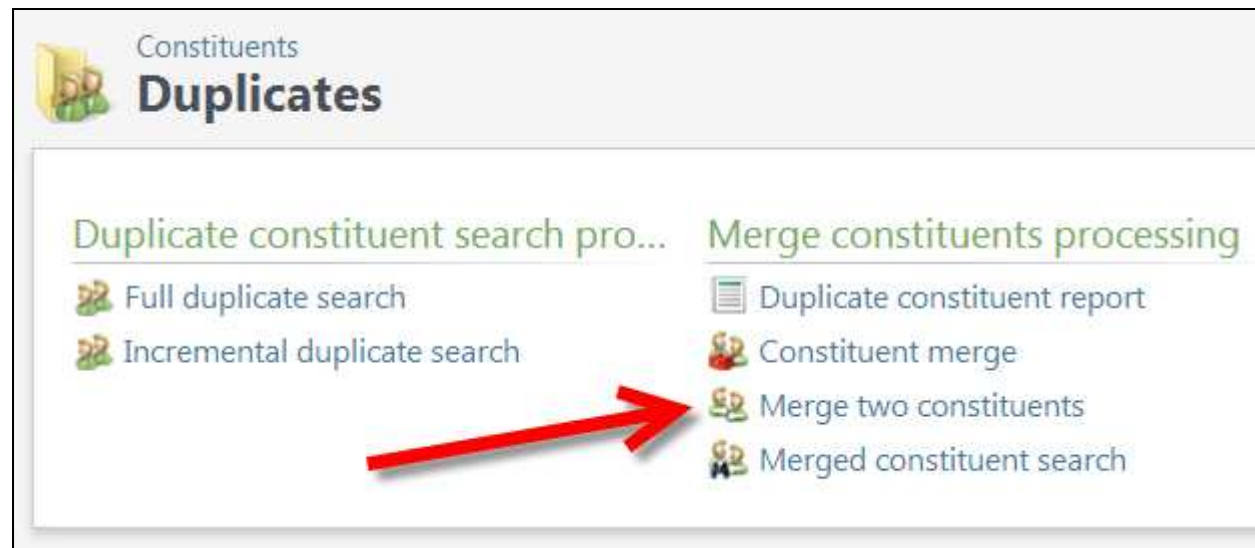
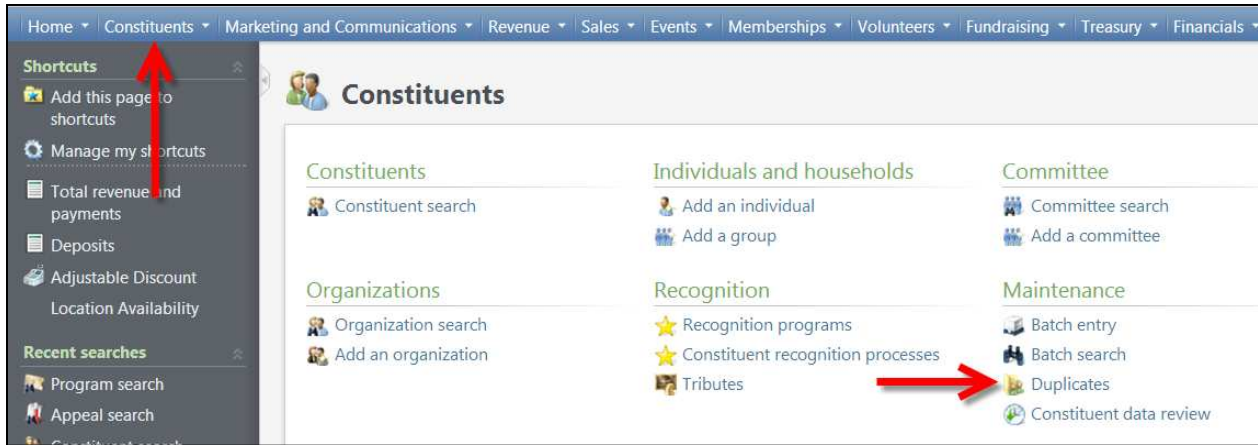
Merge Processes Merge Configurations

Merge configurations (1)  Add  More ▾

Name	Description
 Default configuration	Merges all constituent attributes

 Edit  Delete

Merging two known duplicate Constituents



Merging two known duplicate Constituents

Edit constituent merge configuration

Name: ←

Description:

Merge tasks

- Addresses
- Aliases
- Alternate lookup IDs
- Appeals
- Blackbaud Internet Solutions
- Board membership
- Committees
- Constituencies
- Constituent attributes

Appeals merge task
This merge task merges the appeals associated with two constituents.

Task options

Exclude duplicate appeals

Merge two constituents

Source constituent: 🔍

Target constituent: 🔍

Merge configuration: ▼

Delete source constituent

Mark source constituent inactive

Inactive reason: ▼

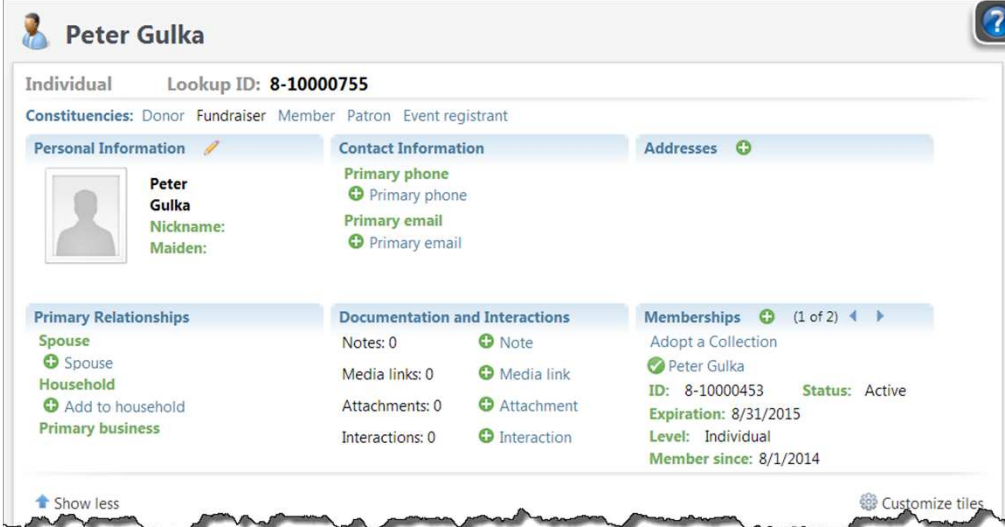
Inactive details:

Help Merge Cancel

- The Merge configuration determines how records will merge

Merging two known duplicate Constituents

- Review the Target Constituent data to ensure only valid data remains.



The screenshot displays a constituent profile for Peter Gulka. The profile is organized into several sections:

- Individual:** Lookup ID: 8-1000755
- Constituencies:** Donor, Fundraiser, Member, Patron, Event registrant
- Personal Information:** Peter Gulka, Nickname, Maiden
- Contact Information:** Primary phone, Primary email
- Addresses:** (Empty)
- Primary Relationships:** Spouse, Household, Primary business
- Documentation and Interactions:** Notes: 0, Media links: 0, Attachments: 0, Interactions: 0
- Memberships:** (1 of 2) - Adopt a Collection, Peter Gulka (ID: 8-1000453, Status: Active, Expiration: 8/31/2015, Level: Individual, Member since: 8/1/2014)

At the bottom, there are links for "Show less" and "Customize tiles".

- Some data may still be duplicated such as Addresses and Attributes.

Questions?



Summary

- Define and discuss Record Maintenance
- Run a query to isolate erroneous addresses, missing titles, and genders
- Discuss how to use the query browse function
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- Define and discuss duplicate records
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Resources

- Great Blog from Stephanie Henke, Altru Community Champion
<http://www.blackbaudknowhow.com/altru/keep-it-clean-3-ways-to-keep-your-altru-data-clean-from-stephanie-henke-nantucket-historical-association.htm>
- Tips for avoiding bad data to begin with:
 - data entry standards document for all users; adding new members of households via the Household record rather than using Add Individual
 - https://altrucommunity.blackbaud.com/altru/topics/copying_household_address_to_all_members
 - Setting constituent matching settings so that Altru identifies possible duplicates during data entry -
<https://www.youtube.com/watch?v=96MlmlppbOo>
 - How it works online: <https://www.youtube.com/watch?v=mKR9N7o73VQ>
 - How it works for batch - <https://www.youtube.com/watch?v=c8jO7rzHk8I>

Resources

- Use export, MS Excel, and import with constituent update batch for larger numbers of records that need data clean-up:
 - Altru Export Basics <https://www.youtube.com/watch?v=6XBKc35AZ7U>
 - Altru Import Basics <https://www.youtube.com/watch?v=nGGh8sHXGhs>.
- Handy Excel functions to learn:
 - PROPER – capitalizes the first letter in a text string, and converts all others to lower-case
 - Use for correcting names and formatting addresses
 - CONCATENATE – combines multiple text strings into one field
 - Use for combining multiple address lines together
 - LEFT, RIGHT, MID – use to select portions of the text in a field
 - Use for splitting up Name fields into First Name and Last name columns
 - “Text to Columns” function – splits up data from one column into multiple columns
 - Use to split up Name into Title, First, Last, Middle, Suffix, etc
 - VLOOKUP – look up data stored in a separate file and use it to replace data in the worksheet you plan to import
 - Use to replace ID values with Description values or vice-versa when those values are in a separate spreadsheet