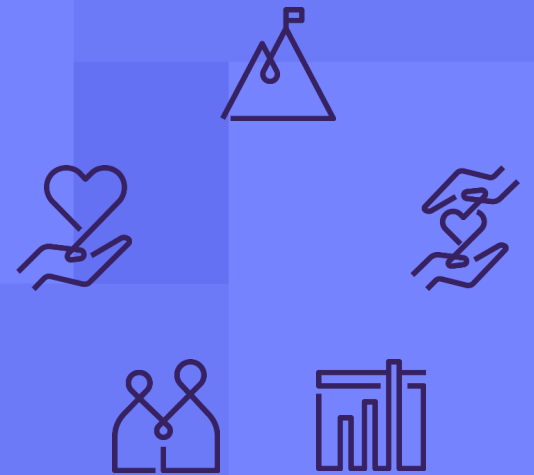


**DONOR ENGAGEMENT**

# Keeping Your Contacts Clean: A Best Practice Guide



# Meet your Trainer...

Ryan Sauve

Training Specialist

Donor Engagement

EveryAction



# Agenda

1. Contact Records Matching
2. Merge Duplicate Contact Records
3. Delete Contact Records
4. Q&A



# Contact Records Matching

# Contact Record Matching

When you upload contacts via Bulk Upload, receive a submission through an Online Actions form, or add a contact via Quick Entry, we automatically check to see if the information being entered matches a contact already within your database.

How **Person-Matching** works:

- Uses a weighted algorithm to compare 60+ criteria on Individual and Organization Contact Records
- All records, including suppressed records, are used in Contact Record Matching
- Follows the Committee hierarchy for multi-committee setups
- Utilizes Voter Registration Status (if included)





# Duplicate Records Matching Troubleshooting

We cannot always detect duplicates. Sometimes records are incomplete or do not have enough information to be matched. Supporters (or staff members) also sometimes input data inaccurately, or their contact information may have changed.

All of these cases can circumvent our matching process and result in a duplicate contact record being created.

To address these instances, you can:

- Manually search for duplicates yourself
- Merge duplicates yourself within your database
- Practice good data hygiene



# Merge Duplicate Contact Records

# Merge Duplicate Contact Records

There may be times when you find someone appearing in your contact database multiple times - even though they are clearly the same person.

Some ways to maintain the health of your database include:

- Regularly De-duplicating Contact Records
- Using a procedure for data entry across your departments

You can easily find and merge duplicate records:

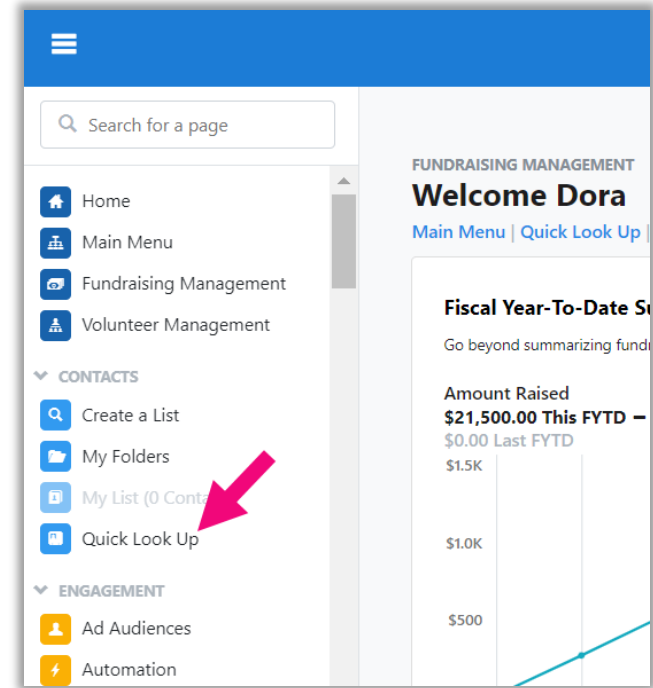
- Using Quick Look Up
- From My List using the Duplicates Tool
- From the Individual Contact Record





# Merge Records in Quick Look Up

**Quick Look Up** will accept partial inputs and return all possible matches. For example, if you enter one letter for Last Name, it will find every record that has a last name that starts with that letter. If too many results return, you will be asked to refine your search by providing more information.



CONTACTS  
**Quick Look Up**

Last Name	First Name	Middle Name	Nickname	Type of Contact
austen	j			
Common Name	Official Name	ID	VANID	
		VANID		
Street Address	City/Town	State	Zip	Country
Email	Country Code	Phone		
<input checked="" type="checkbox"/> Use SmartName search technology				
Remember Filters		Clear	Search	

If you leave **SmartName** search on, it will also try to match names based on common alternative spellings for names and nicknames.

# Merge Records in Quick Look Up

When searching for duplicates, it can be useful to try to keep the search a little broad so you get as many possible versions of a name as possible. So, for example, if you suspect you have some misspelled entries that are the same person, you might want to only use a few letters in the name so you can see more options.

Follow	Name	Address	City	State	Zip/Postal	Country	Phone	Email	Work Zip	
<input type="checkbox"/>	<input checked="" type="checkbox"/> Following	Austen, Janis	1000 Pemberly Pl	Petaluma	CA	94954	United States	(201) 555-5555	janisausten@sink.sendgrid.net	94954
<input type="checkbox"/>	<input checked="" type="checkbox"/> Following	Austen, Joe	557 Wooten Way	Petaluma	CA	94952	United States	(415) 555-5555	joeausten@homeemail.com	
<input type="checkbox"/>	<input type="checkbox"/> + Follow	Austen, Joel						jausten@workemail.com		

Once you've performed the search, you can use the checkbox next to two of the records you wish to merge and then click Merge Duplicates. You can only merge two contact records at a time. The button will be grayed out until two boxes are checked.

**Control Panel**

If the contact is not listed below, click here to add a new contact

←

Records can only be merged two at a time

Follow	Name	Address	City	State/Province
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Following	Austen, Joe	1000 Pemberly Pl	Petaluma CA
<input checked="" type="checkbox"/>	<input type="checkbox"/> + Follow	Austen, Joe	557 Wooten Way	Petaluma CA

# Merge Records in Quick Look Up

You will see a comparison of each record side-by-side. You can select which record should be kept as the Primary record. The other record will be merged into the primary record and then deleted. You can use the blue external link icons to view each record on its own in a new tab.

Contact Information		Joe Austen (Primary)	Joel Austen
			<input type="button" value="Make Primary"/>
VANID	108022237	<input checked="" type="checkbox"/>	109365007 <input type="checkbox"/>
Date Created	5/29/19 1:57 PM		6/16/20 4:32 PM
Date Acquired	<input checked="" type="radio"/> 5/29/19 1:57 PM		<input type="radio"/> 6/16/20 4:32 PM
First Name	<input checked="" type="radio"/> Joe		<input type="radio"/> Joel
Middle Name			
Last Name	Austen		Austen

Fields where multiple values can be stored--such as emails, phones, and addresses--will be combined into your Primary record during the merge.

# Merge Records in Quick Look Up

For fields that can only have one value, you'll need to choose which data to keep. Tab through each part of the contact record using the links on the left.

The screenshot displays the 'Merge Records' interface. On the left, a vertical list of tabs includes 'Contact Information' (9), 'Contact Preferences' (0), 'Activist Codes' (1), 'Contribution Totals' (1), 'Custom Fields' (0), 'Disclosure Information' (2), 'Events' (0), 'External IDs' (0), and 'Financial Households' (11). A warning sign is present next to the 'Contact Information' tab. The main area shows a comparison of two records: 'Joe Austen (Primary)' and 'Joel Austen'. The 'Joel Austen' record has a 'Make Primary' button. The 'First Name' field is highlighted with a red arrow pointing to the 'Joel' radio button. Other fields shown include VANID, Date Created, Date Acquired, Middle Name, Last Name, and Suffix.

Field	Joe Austen (Primary)	Joel Austen
VANID	108022237	109365007
Date Created	5/29/19 1:57 PM	6/16/20 4:32 PM
Date Acquired	<input checked="" type="radio"/> 5/29/19 1:57 PM	<input type="radio"/> 6/16/20 4:32 PM
First Name	<input checked="" type="radio"/> Joe	<input type="radio"/> Joel
Middle Name		
Last Name	Austen	Austen
Suffix		

A warning sign will appear next to any tab that has a field requiring intervention. For example, two records may have conflicting Custom Fields for which there can only be one value applied (e.g. Level of education: high school vs. college degree). In these cases, you will need to select the value to be retained in the merge by using the radio buttons.

# Merge Records in Quick Look Up

Once you've made all your selections, select Merge from the bottom of any page and confirm the action.

## Merge Duplicates

**Confirm Merge**

**Are you sure you want to merge these two contacts records?** The Secondary Contact Record will be removed from any lists or saved searches and the Merged Primary Record will only be shown on lists and saved searches that the Primary Contact Record belonged to. **This action is irreversible.**



# Merge Records with My List and from the Contact Record

For a step-by-step guide on how to merge records from My List and to merge records from the Contact Record, please reference the help article [Merging Duplicate Contact Records](#).

## Troubleshooting Merges:

There are a few times when you might not be able to merge two records. Most of the time, this will be because you do not have sufficient editing privileges for both records. But there are some specific cases where we prevent a merge from happening, including when:

- you don't have permission to see conflicting Custom Field values on both records
- you are trying to merge an Organization record with a Person record
- one or both records are part of a Joint Fundraising Committee
- you file Disclosure Reports and the secondary record you're trying to merge was already associated with a disbursement or contribution
- the secondary contact record is linked to a Public User ID
- you don't have access to the Job records that have conflicting values

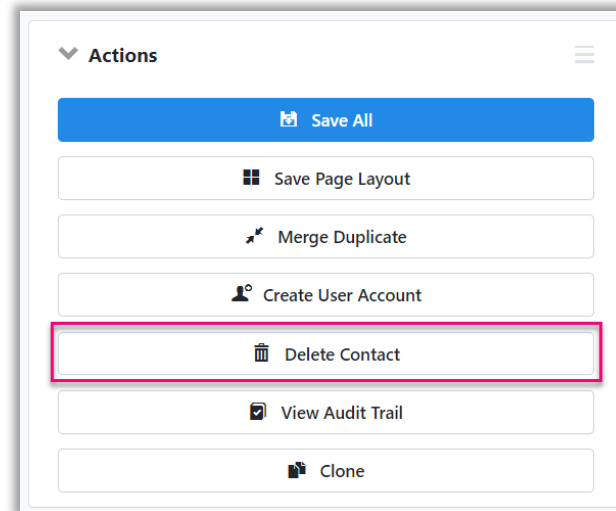
# Deleting Contact Records

# Deleting a Single Contact Record

The best way to **maintain an up-to-date and accurate database** is to conduct routine searches for duplicates and merge them. Sometimes, however, you will have contacts that are created by mistake or that don't have any data you need to keep. You can **delete these contacts directly from the contact record**.

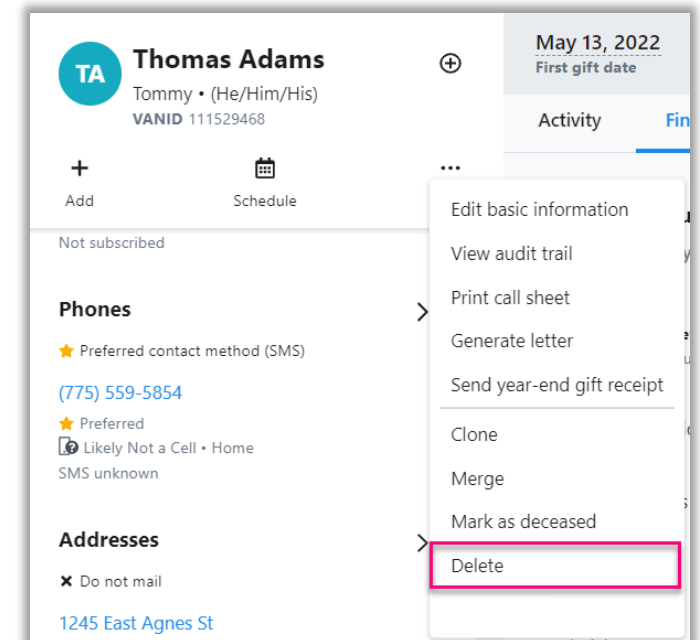
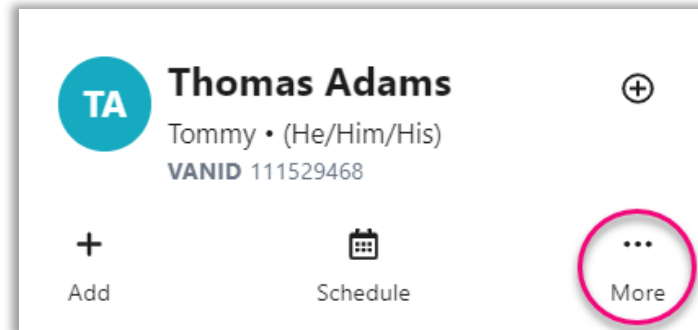
## Deleting via All Details page:

- Navigate to the Actions section of the All Details page and select Delete Contact to remove the record
- Choosing this option immediately deletes the contact from your records



## Deleting via Overview page:

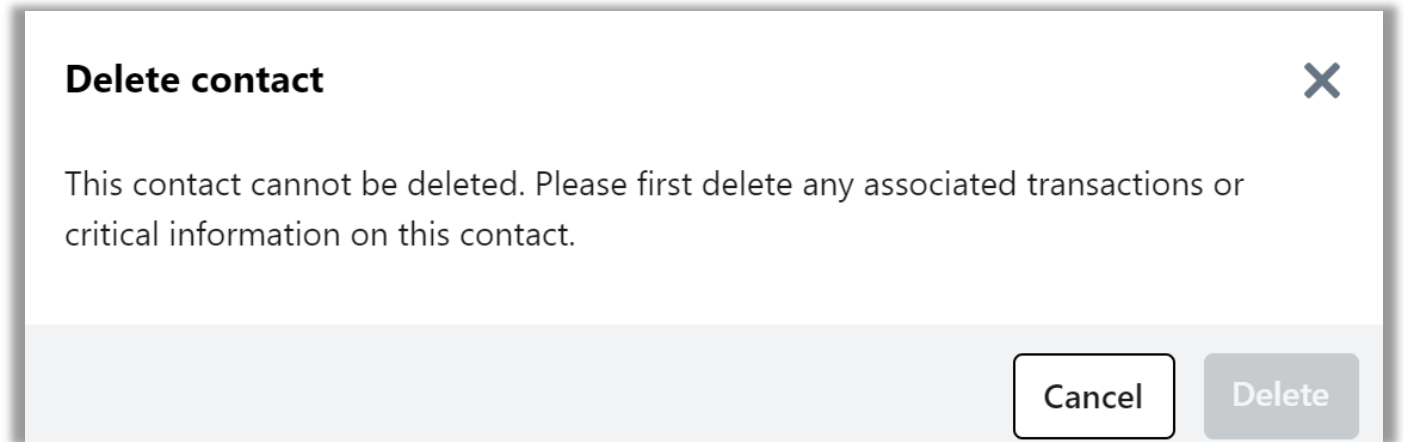
- Open the **More action menu** on the left-hand column and **select Delete** to remove the record.
- Choosing this option immediately deletes the contact from your records.



# Using Suppressions Instead of Deleting

If a contact record contains any of the following data, it cannot be deleted:

- Contributions
- Pledges
- Recurring Commitments
- Disbursements
- Debts
- Action Plans
- Membership
- Primary member of Financial Household



This **prevents deleting contacts with a financial relationship to your organization**, which decouples those donations or other financial transactions from any history.

A message appears to say you cannot delete a contact if it includes any financial data.

To exclude records that cannot be deleted from your searches, apply Suppressions.

# Q&A



# Additional Resources

# Support

- Contact your System Administrator
- Email [help@EveryAction.com](mailto:help@EveryAction.com)
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM



# Help Center Resources

- [Understanding Bulk Upload Requirements and Limitations](#)
- [How to: Use Bulk Upload Templates](#)
- [Tutorial: EveryAction Bulk Upload Basics](#)
- [Finding Recent Bulk Upload](#)
- [How to: Update records using Bulk Uploader and Bulk Apply](#)
- [How to: Export a List](#)
- [Fundamentals: Understanding Contact Record Matching](#)
- [How to: Merge Duplicate Contact Records](#)
- [How to: Delete a Single Contact Record](#)



# Additional Training

- Bonterra Academy:  
<https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup>
- Foundational Webinar Series
- Upcoming initiatives
- Videos in Bonterra Academy



Thank You for Attending!

