Humanitru

# Data Cleaning

## Best Practices Guide

Humanitru

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# Overview

Clean data is the foundation upon which successful fundraising campaigns and impactful donor relationships are built. By ensuring the accuracy, completeness, and consistency of your data, you unlock its true potential to drive informed decision-making, targeted communication, and streamlined operations. It's time to harness the power of clean data to propel your organization forward!

In this guide, we provide you with step-by-step instructions to establish robust weekly, monthly, quarterly, and annual data cleaning protocols, as well as those best executed on special occasions, like before any mailer or after fundraising events. From identifying and resolving duplicate records to standardizing data formats, these protocols will help you maintain data integrity and minimize errors. With well-defined procedures in place, you can ensure that your data remains accurate and reliable over time.

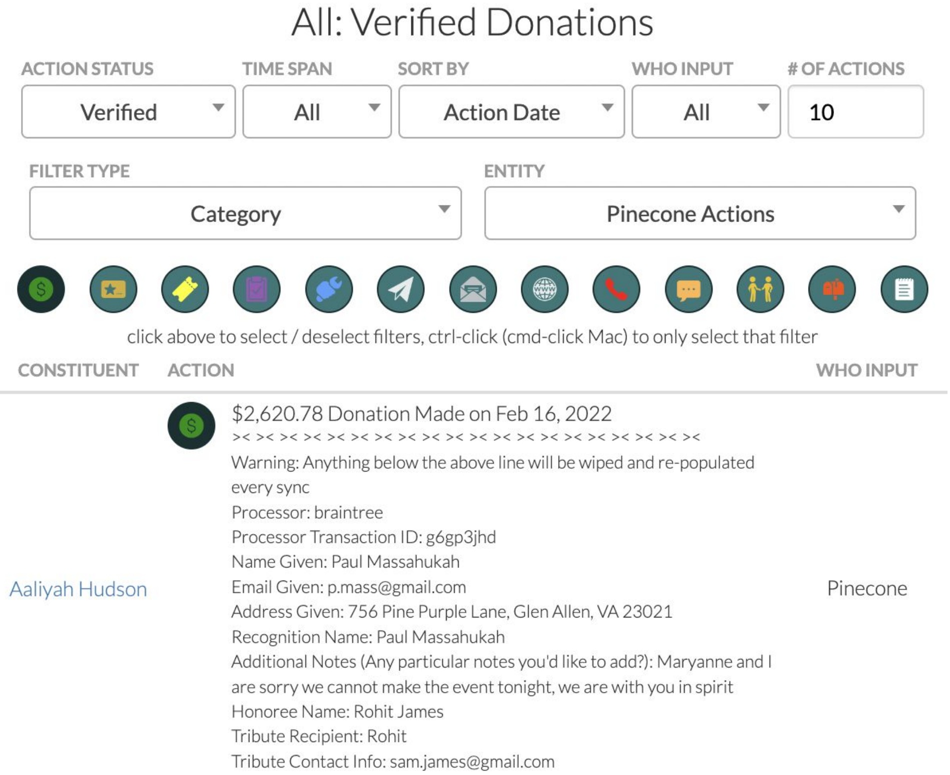
# Weekly

**Check Tribute Gifts**

- Sometimes donors request that an email or a notification of their gift be sent and you don't want to miss their request!
- [Check out this video for how to review tribute gifts]()

**Check notes left in online donations**

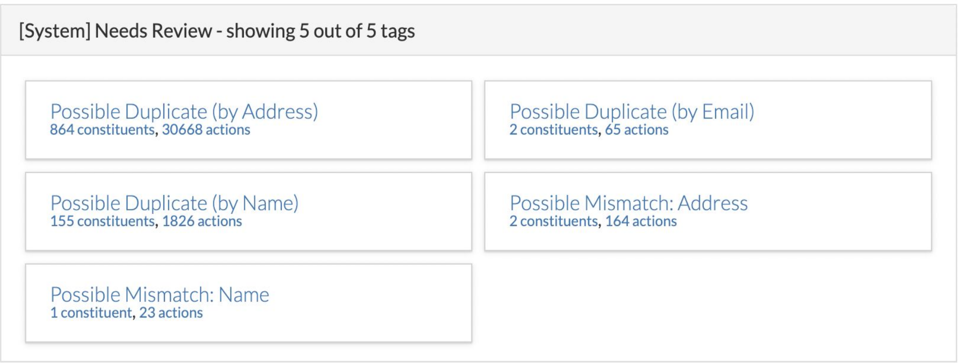
- Sometimes people leave notes when they make an online donation that you don't want to miss
- One idea to help you stay on top of notes coming in with your online gifts is to add a List Widget to your dashboard with Filter Type = Category and Entity = Pinecone Actions



# Monthly

**Check for Possible Duplicate constituents and merge them**

- Check out this video for how to run a duplicate constituent check and merge duplicate constituent accounts
- You can find a list of possible duplicate constituents by name, address, and email under Tags. The specific Tag Group you need to look for is [System] Needs Review. These tags don't update themselves unless you run a duplicate check, check out the video above for how to do that.
- What's the difference between a possible duplicate and a possible mismatch? Check out our Help Center article.

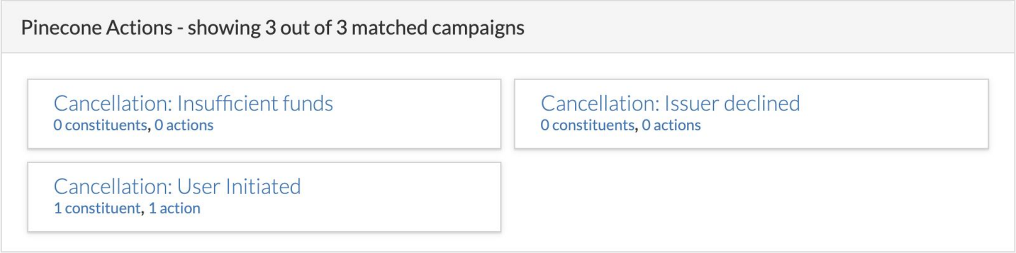


**Check for Possible Duplicate transactions and reconcile them**

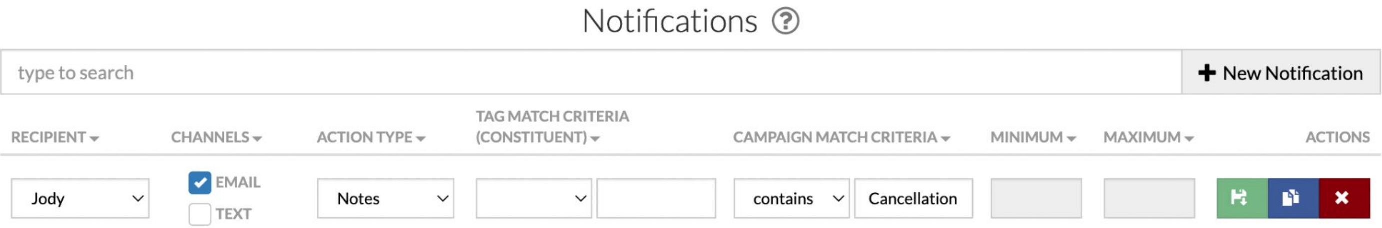
- Check out this video for how to run a duplicate transaction check and reconcile duplicate transaction entries
- You can find a list of possible duplicate transactions under Campaigns. The specific Campaign Category you need to look for is Needs Review. This Campaign doesn't update itself unless you run a duplicate check, check out the video above for how to do that.

**Check canceled recurring gifts and reach out to encourage donors to update their credit card information or re-start their recurring gift**

- Recurring gifts can either be canceled by a donor (called “user initiated”) or because of a credit card decline. You can find a list of cancellations and reasons for the cancellations under Campaigns. The specific Campaign Category you will find cancellations under is Pinecone Actions.



- To get notified in real time of recurring donors whose gift is canceled or doesn’t go through, set up a notification for yourself in Settings with the following criteria:



**Check your Household Tags and make sure all soft credits are appropriately applied**

- If you aren't tagging your Household accounts, we highly recommend starting. It's a great way to make sure that acknowledgements and soft credits are always handled appropriately. Check out this video for how to add a new Tag.
- One way to find potentially untagged households is to search in Constituents with the Field Value filter for Mailing Name fields that contain the word "and". Check out this video for a walkthrough of how to pull a report filtering Mailing Name fields.

**Check Donor Advised Fund tags and make sure all soft credits are appropriately applied**

- If you aren't tagging your DAF accounts, we highly recommend starting. It's a great way to make sure that acknowledgements and soft credits are always handled appropriately. Watch this video for how to add a new Tag.
- One way to find potentially untagged Donor Advised Funds is to search in Constituents for "fund". You can use the logic in this video to pull a report containing the word "fund" in Constituent records.

**Check non-individual constituent type Tags to ensure that all are appropriately applied**

- You can use the same logic in the DAF video above to search for keywords like “Foundation” or “University” in Constituents to catch non-individuals and make sure all are tagged properly

**Review all unverified transactions and reconcile them**

- This is important because you may have a scenario where a pledge was entered as unverified, however the person entering the check when it arrived added it to the constituent record instead of verifying the outstanding pledge, leaving both a verified and unverified pledge on the constituent record. Check out this video for how to review unverified transactions.

# Quarterly

**Review all Alpine user permissions and permission levels to ensure all users have the appropriate level of access to your database**

- For a list of different permission levels and what access each level gives users, check out this Help Center article.
- Check out this video for how to change a user's permission level or lock their account entirely.

**Review all Evergreen users to ensure all users should have access to Evergreen**

- Users must create separate accounts in Evergreen and in Alpine, meaning that if you remove someone's access to Alpine, it doesn't automatically remove their access in Evergreen. Alpine users are found under Settings and Evergreen users are found under your staff page. Check out this video for how to find a list of Evergreen users and disable their admin accounts.

**Review prospect Tags and make sure those that have converted to donors are untagged**

- If you're not Tagging prospects, we highly recommend doing so as a way to keep track of your target list and those that you convert from non-donors to donors.
- Keep in mind that if you are tracking prospects who converted to donors, you will want to leave them tagged.

**Update any major donor Tags if their giving threshold has surpassed your major gift definition**

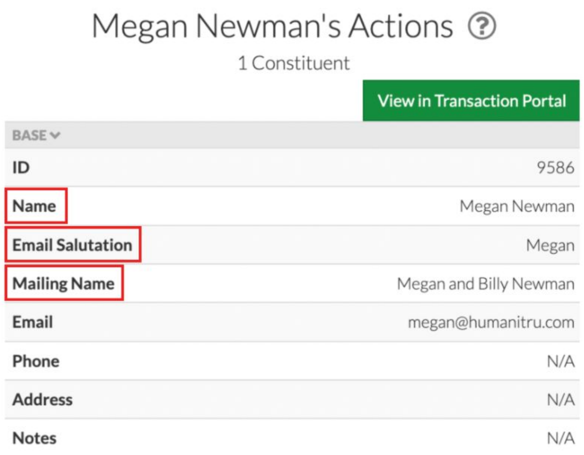
- We always recommend tracking major donors in a report, but some users prefer to tag them.
- Check out this video for how to set up a major donor report.

**Update any volunteer Tags if volunteers have become inactive or if your organization has acquired new volunteers**

- We always recommend tracking active and inactive volunteers as a report, but some users prefer to tag them.
- You can use the logic from this video to check for active and inactive volunteer and ensure they are appropriately tagged.

**Review all salutations to ensure your mailings and emails are accurate**

- We understand that this may be impossible for large organizations and you may want to set up a prioritization list, for example, you only check salutations for donors who give over $1,000.
- It's especially important to make sure all households have matching Mailing Name Fields.
- Humanitru has the following default salutation fields, however your organization may set up additional custom salutation Fields to fit your needs. (Example at right.)
- [Check out this video for how to pull all salutation fields into a single report.]

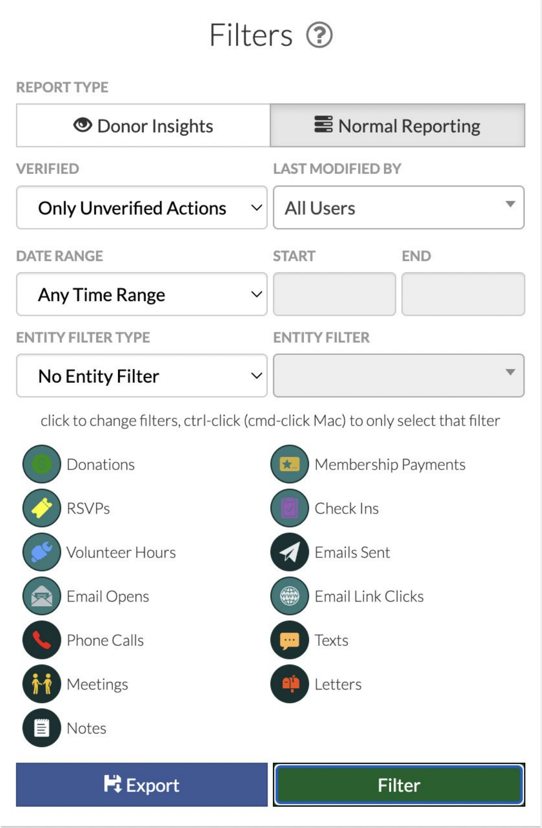


**Review Humanitru Smart Automations to ensure they are all relevant and accurate to your current workflow and processes**

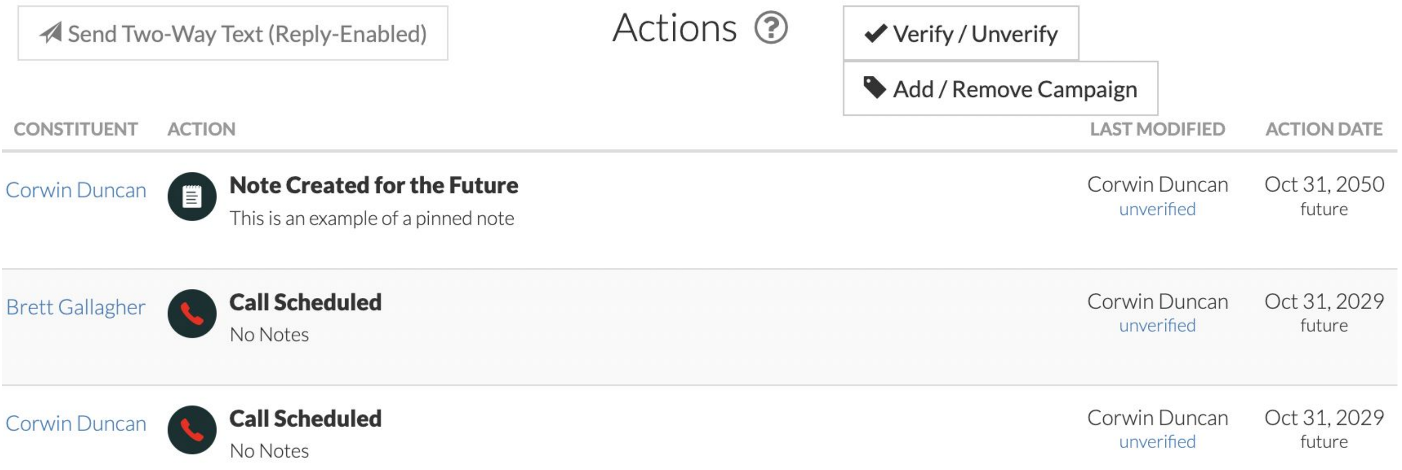
- You will need to reach out to your Humanitru Customer Success Representative to get a list of all Humanitru Smart Automations in place. Many of them are written in code but your Humanitru rep can easily break them down for you!
- Not sure what a Humanitru Smart Automation is? [Check out the list of possibilities for streamlining your everyday workflows - saving you time and money - on our website.]

**Check all unverified stewardship or task Actions to ensure that none need to be reassigned or modified**

- For example, if a user has left your organization and has unverified tasks, they will need to be modified to another user so that the ball doesn't get dropped on any important tasks
- You can check all unverified stewardship actions using the following filters in the Actions interface (at right)



- These filters will return a list of all unverified actions and who they are “assigned to” under the LAST MODIFIED column. To change the user in the LAST MODIFIED column to yourself, simply click the action, scroll to the bottom of the pop up screen, and click Save. You can also change the notes associated with the action and the due date of the action by clicking it and modifying it in the pop up screen.



# Annually

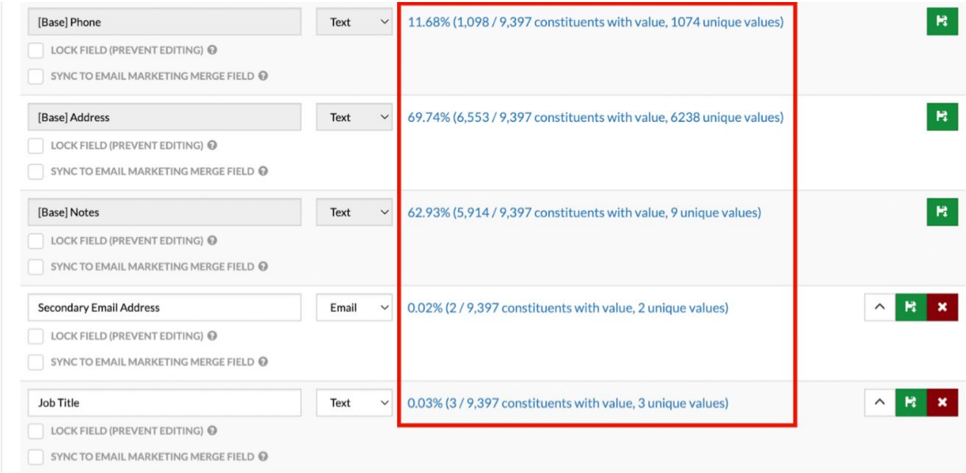
**Review all Tags for relevance and delete those that are no longer needed**

- [For videos and articles on how to merge or delete Tags, check out our Help Center]

**Update all Tags that change annually such as staff, board members, deceased**

**Review all Campaigns for relevance and archive those that are no longer needed**

- [Check out this video for how to merge Campaigns]
- [Additional articles related to Campaigns can be found in our Help Center]



**Review all Custom Fields for relevance and delete those that are no longer needed**

- Custom Fields can be found under Settings. Please note that Base Fields cannot be renamed or deleted.
- You can easily see how complete your Fields are by reviewing the stats automatically provided by Humanitriu
- If your completed Custom Fields have low usage, consider sending a survey to collect things like phone numbers and mailing addresses to update your Constituent profiles

**Consider remapping Tags, Campaigns, and Custom Fields that don’t make sense to your workflows anymore**

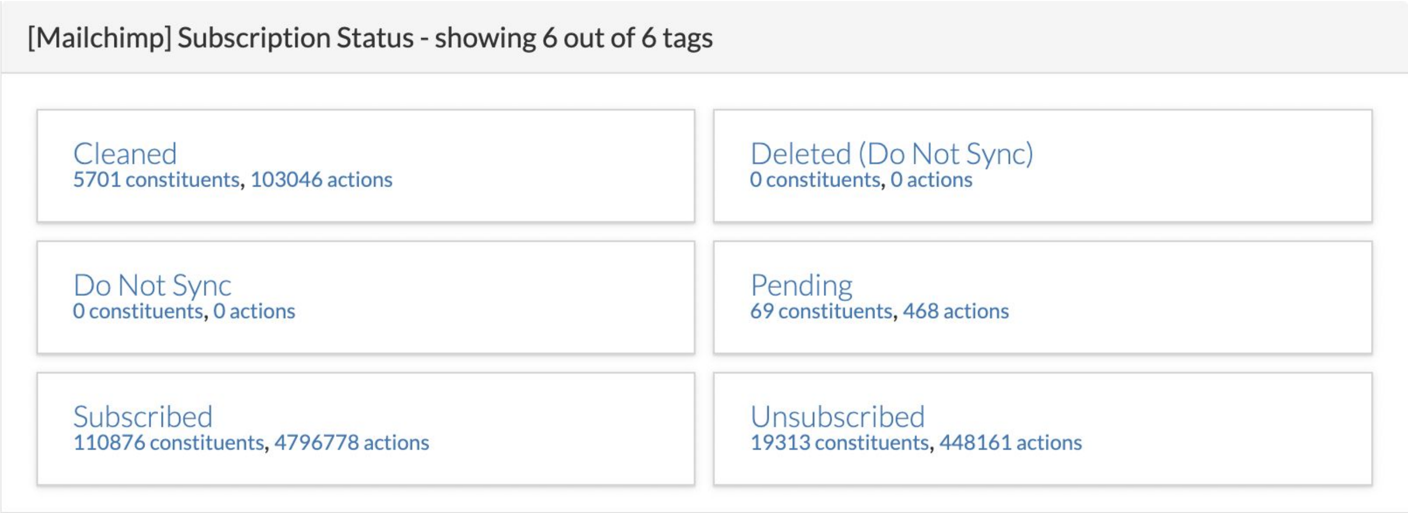
- Sometimes clients set up their system and then realize, for example, that some Custom Fields make more sense as Tags. Contact your Customer Success Representative if you want to review your Tags, Campaigns, and Custom Fields and consider remapping the way you organize your data to better accommodate your workflows.

**Review Constituents tagged as Do Not Sync**

- Check out this Help Center article for an explanation of the Do Not Sync Tag

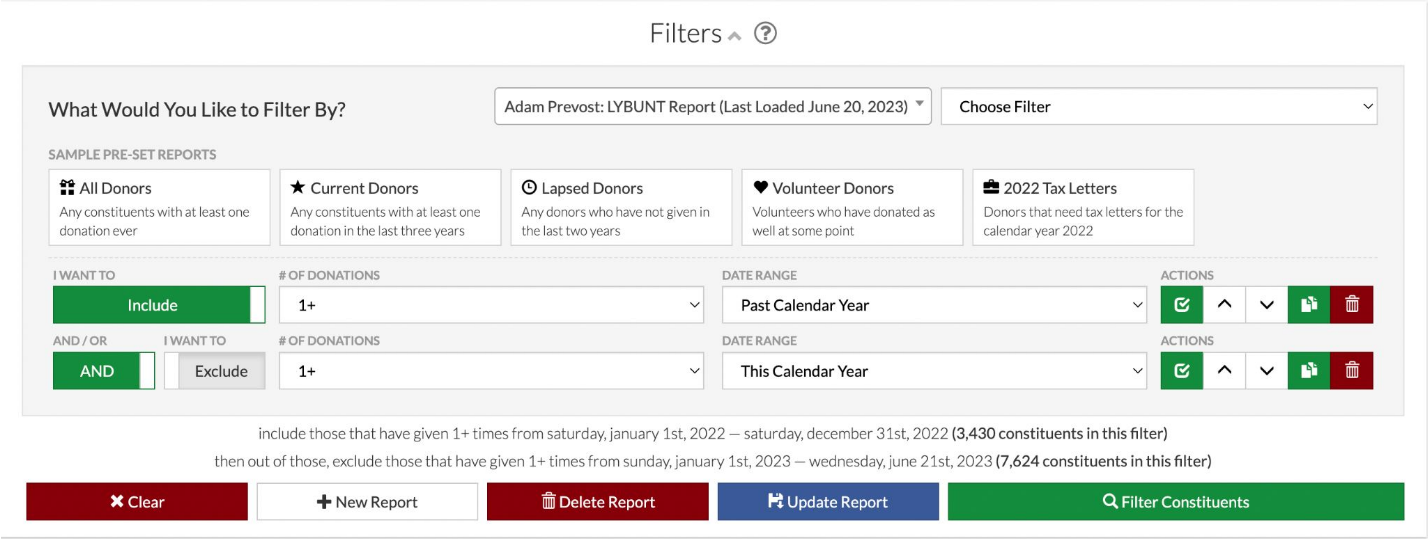
**Consider a resubscribe campaign of unsubscribed Constituents who are not deceased and have donated, purchased a ticket, purchased a membership, or volunteered recently**

- You can see a list of all unsubscribed Constituents under Tags



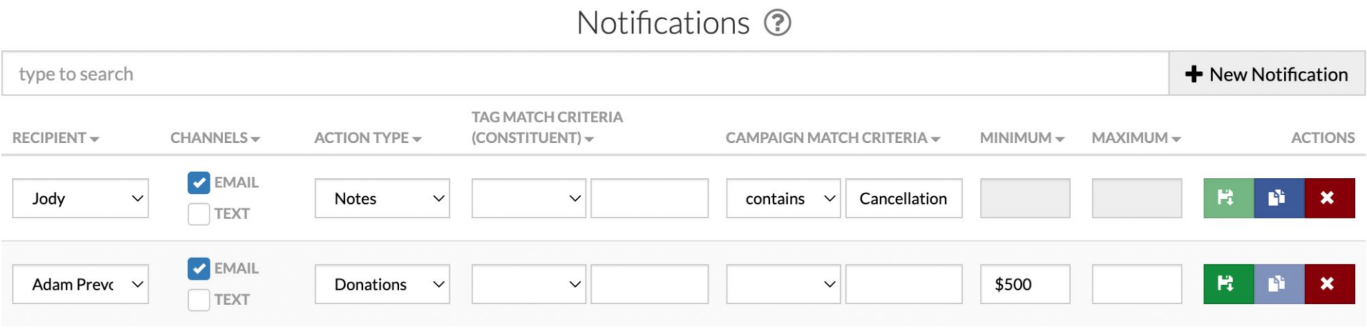
**Delete old reports that are not longer useful**

- You can see the last time a report was loaded in the Choose Saved Report drop down menu in Constituents
- You can also delete or rename your reports in Constituents



**Delete old Notifications that are no longer useful or add new Notifications that would be useful**

- All notifications can be found under Settings
- [For videos and articles related to Notifications, check out our Help Center]



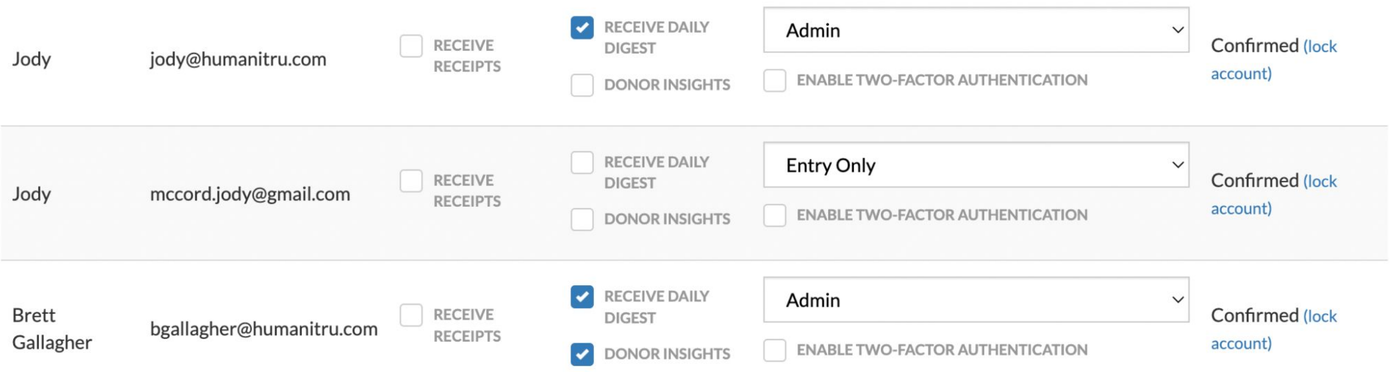
**Archive any Systems Generated Mailings that aren’t necessary to keep**

**Consider adding Humanitru Smart Automations to save you time and money and keep your data clean**

- Not sure what a Humanitru Smart Automation is? [Check out the list of possibilities for streamlining your everyday workflows here.]

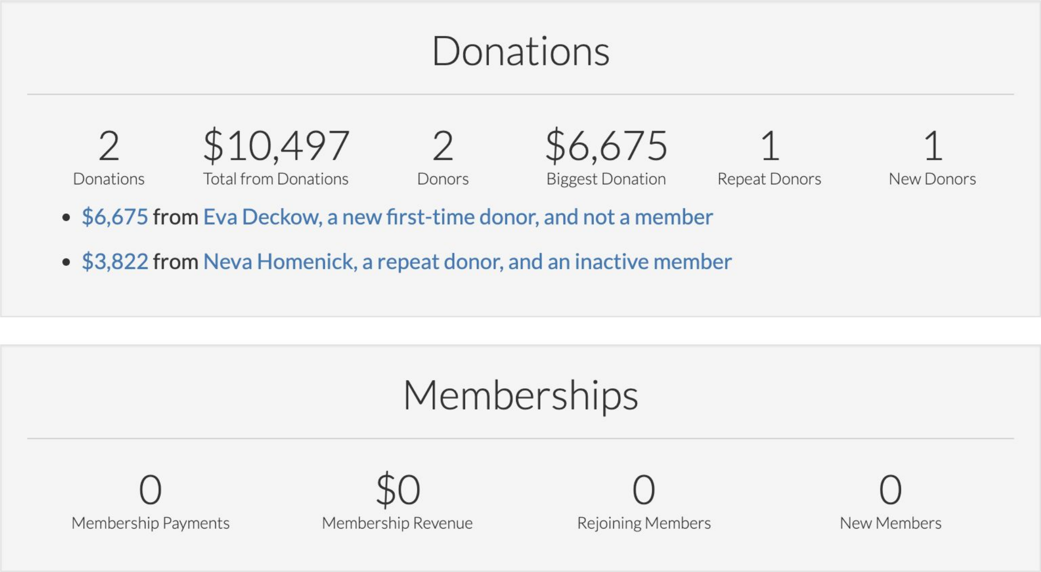
**Check Settings and make sure the appropriate users are selected to receive receipts**

- Receipts are sent from Humanitru for payments made and typically go to the financial or accounting point of contact at your organization
- [For more information on the Settings interface, check out our Help Center video here]



**Check Settings and make sure the appropriate users are selected to receive Daily Digests**

- The Daily Digest is a daily email recapping your organization's financial activity for the day. It contains sensitive information so you want to be sure only certain users receive it.
- The image below shows some of the information emailed in the Daily Digest.
- For more information on the Settings interface, check out our Help Center video here



**Check Settings and make sure the appropriate users are selected for access to Donor Insights**

- Similar to the Daily Digest, Donor Insights includes a series of emails and an interface that contains highly sensitive financial and donor information.
- Not sure if your organization has access to Donor Insights? It is a product upgrade that you can learn more about here! Please reach out to your Customer Success Representative with any questions.

**Check Settings and make sure all users that you want to have two-factor authentication turned on (or off) are reflected**

- Sometimes there are insurance related requirements for two-factor authentication settings

**Review your payment processor settings**

- Humanitru is not a payment processor, we simply host the page through which payments are processed. Your payment processor is a completely separate company with their own contracts, portals, and customer support.
- We often see nonprofit donation landing pages targeted for fraudulent attacks. These attacks can have serious financial consequences to your organization if they are successful.
- Check out our Payment Processor Guide here for a list of questions to review with your processor to ensure your account is secure.

**Update your Data Entry Standardization Guide with any workflow changes**

- If you have not created a Data Entry Standardization Guide, we strongly recommend you do so. You can get started by downloading and filling out our template here.

# Before Any Mailer

**Check for possible duplicates so you don't accidentally send multiple mailers to the same address or household**

**Check and clean undeliverable addresses**

- SmartyStreets is an address verification and standardization service. If this integration is part of your Humanitru subscription, Humanitru will send all of the addresses you enter in the Base Address Field on a Constituent record to SmartyStreets and SmartyStreets will both standardize the address into a USPS acceptable format and return a delivery status to your Derived Fields in the Humanitru Constituent profile. If the delivery status is anything but deliverable, you will want to correct those addresses before sending a mailing.

## Alan Wei's Actions

1 Constituent

View in Transaction Portal

| BASE | |
|---|---|
| ID | 7651 |
| Name | Alan Wei |
| Email Salutation | Alan |
| Mailing Name | Alan Wei |
| Email | alan@totemfgf.com |
| Phone | N/A |
| Address | 1717 E Cary St Richmond, VA 23223 |
| Notes | N/A |

| DERIVED | |
|---|---|
| First Name | Alan |
| Last Name | Wei |
| Delivery Status | Deliverable But Missing Secondary (D) |
| Delivery Line 1 | 1717 E Cary St |
| Delivery Line 2 | N/A |
| Last Delivery Line | Richmond, VA 23223-7024 |
| City | Richmond |
| State | VA |
| Zip | 23223-7024 |
| Delivery Point Barcode | 232237024997 |
| County | Richmond City |
| Congressional District | 4th District |

- If you don’t know if you have access to the Humanitru SmartyStreets integration, reach out to your Humanitru Customer Success team for a quote and to get it turned on.
- Check out this video for how to see a Constituent’s address delivery status in a report

**Review Mailing Name Fields for accuracy**

- It’s especially important to make sure all households have matching Mailing Name Fields

**Review our guide on how to send mailings through Humanitru here!**

# Before Any Mass Email

**Review your Do Not Sync Tag and make sure no one needs to be added or removed**

- To understand more about the Do Not Sync tag, check out this Help Center article

**Consider a resubscribe campaign of unsubscribed Constituents who are not deceased and have donated, purchased a ticket, purchased a membership, or volunteered recently**

- You can see a list of all unsubscribed Constituents under Tags

**Review Email Salutation Fields for accuracy**

**Review our Help Center articles about how our email integrations work here**

# After An Event

**Make sure sponsorships, tickets, and donations made online and via check are all mapped to the same event**

- Clients will often setup an event in Evergreen but forget to map manually entered gifts to that event, skewing their event revenue reporting

**Make sure sponsorships, ticket purchases, and donations made online are all mapped to the correct Campaigns**

- Online gifts automatically come in with Evergreen or Pinecone related campaigns only
- If additional Campaigns, such as, Gift Type: Sponsorship, need to be added to reflect your workflows or accounting processes, those additional Campaigns will need to be manually applied
- This is a great use case for Humanitru Smart Automation!

**Make sure all donations that have a Fair Market Value associated with them have the FMV field filled out in both Evergreen and Alpine**

**Apply any appropriate soft credits**

**Tag any new households**

**Delete any dashboard widgets that are no longer relevant now that the event is over**

**Delete any notifications that are no longer relevant now that the event is over**

**Delete any reports that are no longer relevant now that the event is over**

# When a User Leaves Your Organization

**Reassign unverified tasks to an active user**

**Reassign Relationship Manager Tags, if you use them**

**Remove the user’s access from both Alpine and Evergreen**

**Make sure that if the user is set up for certain notifications, those are transferred to someone who is active or deleted**

- Don’t forget notifications set up with your payment processor. Clients often forget to update these notifications when a staff member has left and the processor has no way of getting in touch with the organization about urgent matters like fraudulent attacks.

**Notify your Humanitru Customer Success Representative that a user has left your organization so that we can remove them from our email lists and urgent notifications**

**Our Resources:**

- Humanitru Help Center
- Helpful Articles & Tools