

Data Entry Standard Operating Procedures

Salutation:

All accounts are required to have the salutation field completed.
It can be an **informal or formal** salutation as long as you are consistent.

Example #1:

Account name/Addressee: Mr. William J. Smith
Salutation: William or Bill

**You can use Bill only if you know the donor prefers it over William. Do not assume. You can also look at the name on the check to verify.*

Example #2:

Account name/Addressee: Mr. and Mrs. William Smith
Salutation: William and Julie or Bill and Julie

USPS Address Standardization:

Street	Abbreviate directional to one or two characters (NW or S) Abbreviate street suffix names (Dr, St, Ave, Blvd) Punctuation is not necessary unless it is used for addresses such as: 101½ Main St, 289-01 Montgomery Ave
City	Do not abbreviate
State	Two letters all caps
Zip Code	9 digit zip code, if available, using a dash ex: 92626-8014
Secondary Address Unit Designators <i>(Such as Apartment or Suite)</i>	Place at the end of the address line Prefer the pound sign (#) is not used. If it is used there must be a space between the pound sign and the number Common abbreviations: Apt, Bldg, Fl, Ste, Unit, Rm, Dept
Rural Route/County Road Addresses	Rural Road should be RR County Road should be CR
Post Office Boxes	PO Box

Data Cleansing IOI Webinar

Questions and Answers

Is it possible to get these reports more frequently than on a quarterly basis from Alpha Dog Marketing?	<i>Yes, upon request your dedupe reports can be sent to your monthly. Our typical standard is sending our NCOA reports dedupes and error on a quarterly basis</i>
Is Alpha Dog Marketing able to do data cleanup for us?	<i>Unfortunately no because we feel that you need to go back and look at your donors. This is about knowing your donors and database as far as the best records to keep an update. And so those changes are judgement calls. We are unable to make these calls because we are further removed from your donors.</i>
Are you able to import NCOA address changes for us?	<i>Alpha Dog Marketing can import the forwarding addresses from the NCOA File Changes into Donor Perfect Online if we have access to your database. We do have the ability to do Raiser's Edge but you will need to talk to your AM at ADM to set that up. Bloomerang clients do not have this ability.</i>
When a donor is marked to be mailed once or twice a year, when do they receive the mailing?	<i>For donors that are marked for once a year, they get the October thanksgiving campaign. If they are marked twice a year, we are doing October and March.</i>
Does Alpha Dog Marketing have a best practice or recommendation for informal versus formal salutations?	<i>No. About half of our clients use informal salutations and the other half uses formal salutations. This is completely your organization's preference.</i>



Have more questions for us about data entry and database cleanup?
Give us a call 402.486.0668!