

Best Practices

For Managing Your Databank

Follow these suggestions to keep your Databank safe, clean and effective.

User management

- Each person should have a user account with the precise level of access she needs.
- Use strong passwords and change them frequently.

Data entry

- Design paper forms to make data entry easy, e.g. put fields in the same order and label them the same way.
- Develop internal data entry standards and train your Databank users to follow them. See resource on our web site:
<http://www.thedatabank.com/pubdw/Data%20Entry%20Standardization.pdf>

Volunteers

- Volunteers can help with data entry, cleanup such as merging duplicates.
- Make sure to control their access, and train them on your data entry rules.

Staff turnover

- When a staff person leaves, change their password or delete their user account.
- Remember to tell your Databank account manager the employee has left.
- For new employees: create a user account for them, train them on how you use the Databank, and sign them up for thedatabank's free training.

Database design and modification

- If you need a change, custom report, or other customization, start by sending a Support Request.
- You will tell thedatabank what you want do, and we will recommend a way to implement it, with price estimates if applicable.
- Custom reports are often very affordable and can save you a lot of time, so don't hesitate to inquire about them.

Suggestions and complaints

- Give ideas for new features or changes to your account manager. thedatabank weighs our clients' Wish List heavily in product development decisions.
- Your account manager will help you resolve any complaints or non-technical problems.

Your relationship with thedatabank

- We pride ourselves on keeping clients for the long term and getting most of our new business through referrals.
- Your account manager will check with you regularly to make sure you are satisfied with your Databank, keep you updated on company/product changes, and suggest ways to get more out of your investment.
- The Client Service Manager coordinates setup of new clients and subsequent changes or customization, as well as triaging support requests.
- Take advantage of our free live training and video tutorials, resources on our web site, and tips in the monthly enews.