

# Data Entry Standardization

## Why Standardize?

If you have ever spent hours trying to look up a name that you KNOW is on your mailing list, you understand the importance of accurate and consistent data entry. By standardizing the way information is entered, you increase the usefulness of your database including:

- More accurate query results
- Better success rates for mailing
- Less guess work for data entry staff or volunteers

When considering how to standardize your database, you will have many decisions to make. Should you use all caps, or normal capitalization? Should you store street addresses and apartment or suite numbers in separate fields?

There is no right or wrong answer to many of these questions. It depends on your priorities and how you intend to use the data. Put some thought into it, choose one way to enter data, and enter it that same way every single time. This is so important I'll say it again: be consistent.

In the sections that follow, you will find some suggestions for standardizing your data entry. You may wish to use this as a worksheet for developing your own set of data entry guidelines.

## Main Member Information

### Example

You've just returned to the office after busy day at the state fair. Your organization had a table where you collected contact information from fair-goers who want to be added to your mailing list. You log in to thedatabank, and prepare to enter the information for this married couple:

Mary Ann T Carson-Roth and Stuart Roth  
123 West Main Street, Apartment Six  
St. Paul, Minn. 55101  
651-555-1234  
maryann@mnroth.com  
stuart@mnroth.com

### Names

When deciding how to format names, think about how the names are used. Will you use your database for a mail merge? If so, will you use both a formal and informal greetings? How will the way you enter names affect queries?

It is generally recommended that you use standard capitalization, although the Post Office convention is to use all caps.

Following are some suggested formats for the main fields in thedatabank. Common abbreviations appear in a later section.

## Title

- Use the common abbreviation, capitalize the first letter, and end with a period.
- Example: Mrs.

## First Name (First) / Middle (MI) / Last Name (Last)

- Use standard capitalization.
- If the record is for a couple, use these fields for the name of the primary person.
- You may use a full middle name, or a middle initial. If using an initial, do not use a period after the middle initial.
- For un-hyphenated last names with two parts, use the "MI" field for the first part of the name.
- For hyphenated last names, put the entire last name in the "Last" field.
- If a middle initial or other information is unknown, leave the field blank.
- Example: Mary Ann / T / Carson-Roth

## Title2 / First2 / MI2 / Last2

- This second set is generally used for a spouse. You will want individual records for each partner if you need to track their contact histories, giving records, or activist records separately. There is a Householding function that will eliminate duplicate mailings to the same address.
- Example: Mr. / Stuart / / Roth

## Salutations

- This field can be used in mail merges, to store a nickname or preferred name.
- Use "Salutation 1" for an informal address, "Salutation 2" for a formal address.
- Example: Mary Ann and Stu Roth  
Mr. Stuart Roth and Mrs. Mary Ann Carson-Roth

## Company

Spell out the organization name. Avoid abbreviations. You may wish to have a distinct field (not this one) to indicate a person's employer, if your organization does not have a relationship with that employer.

You can also keep a general record for the organization, and leave the name fields blank.

## Addresses

Choose a format and stick with it. Frequently organizations will use the US Postal Service addressing standards (see Common Abbreviations section below). That enables you to more easily get bulk mail rates and verify addresses.

When you are using thedatabank's automatic Label function, the fields will appear in this order:

1. First Name, Last Name
2. Company (skipped if the field is blank)
3. Address
4. Address line 2
5. City, State, ZIP

### Address

- Use this field for apartment, suite or floor numbers.
- You can also use this field for building names or "care of" instructions.
- Example:       Apt 6; City Hall; C/O Nancy Goodman

### Address line 2

- Use this field for street addresses or post office box addresses.
- For numbered streets, use the number (e.g. 3<sup>rd</sup> Ave).
- Avoid abbreviations in proper names (e.g. Saint, not St.)
- You can also include the apartment or suite number in this field.
- Example:       123 W Main St; 800 Washington Ave S Ste 303

### City

- Spell out the city name.
- Example:       Saint Paul

### State (St)

- Use standard two-letter abbreviation with no periods.
- Example:       MN

### ZIP Code (Zip)

- Use nine-digit code with hyphen when available.
- Example:       55101

Country can be left blank unless it is not the United States.

## Telephone Numbers

Home Phone / Work Phone / Fax / Pager / Mobile

- Use all ten digits.
- If there is an extension, use a consistent format to enter that information. One common way to do this is to use the abbreviation "ext," with no comma. (E.g. 6124552255 ext 3)
- When doing data entry, there is no need to type in the hyphens. thedatabank will automatically add these for you.
- Example:       6515551234

## Email

- Use all lower case.
- You can enter more than one email address in this field; separate them with commas. *Do not put more than one person's email in the same record if you are using e-ActionMax, since this field is used as their user ID. Keep each member of the household in a separate record.*
- Example:       maryann@mnroth.com, stuart@mnroth.com

# Other Data

## Make a Key

There are many places in your databank where you might use codes and list abbreviations. Unless you are lucky enough to own a secret decoder ring, it is important that you make a key. This will help you to be consistent in use of the codes, and it will allow future generations of users to translate them.

## Flags

Flag fields, found in the main member table, can be used to mark members of a certain group or mailing list. You can name a flag field for a specific purpose; for example, name it Newsletter and then use the code to indicate which version of the newsletter this member should receive.

Flags are limited to two characters, so you'll need to create a key (see above).

## Campaigns

It is recommended that you develop naming conventions for campaigns and segments. Creating and storing Campaigns in an orderly manner will make finding Campaigns and producing reports much easier.

It may be useful to structure your numbering system like the library's Dewey decimal system. You can customize a numbering system to meet your organization's needs. Just be sure everybody is using the same system.

## Sample Campaign Numbering System

- 1000 – Prospecting
  - 1100 – Direct Mail
    - 1110 – New Year Mail to Union Members
    - 1120 – Puppy Letter to ABC Members
  - 1200 – E-Mail Marketing
  
- 2000 – Membership Renewals
  
- 3000 – Special Contribution Appeals
  
- 4000 – Events
  - 4100 – Annual Banquets
    - 4110 – Banquet 1999
    - 4111 – Dinner Ticket Sales
    - 4112 – Raffle Sales
    - 4113 – Ad Book Sales
  - 4200 – Annual Bowl-a-Thon
  
- 5000 – Advertisement Space Sales
  - 5100 – Newsletter Ads
    - 5110 – Jan 99 Newsletter
    - 5120 – Mar 99 Newsletter
    - 5130 – Jun 99 Newsletter
  
- 6000 – Merchandise Sales
  - 6100 – T-Shirts
    - 6110 – Sales at Earth Day Rally table
    - 6120 – Sales from Website
  - 6200 – Bumper Stickers
  - 6300 – Books
  
- 7000 -- Miscellaneous Income

# Common Abbreviations

## Titles

Here are some common titles you may come across:

Dr.	Doctor
Mrs.	Married Woman
Ms.	Single or Married Woman – in place of Mrs. Or Miss
Mr.	Mister
Prof.	Professor
Hon.	Judge, Commissioner
Rep.	Representative
Sen.	Senator

## Addresses

The US Postal Service publishes a set of standard abbreviations. Below are some of the most common ones. A complete list can be found on their web site at <http://www.usps.com/ncsc.lookups/abbrev.html>.

Ave	Avenue
Bldv	Boulevard
Cir	Circle
Ct	Court
Dr	Drive
Expy	Expressway
Hwy	Highway
Jct	Junction
Ln	Lane
Pkwy	Parkway
Pl	Place
Plz	Plaza
Rd	Road
Sq	Square

Apt	Apartment
Rm	Room
Ste	Suite
N	North
E	East
S	South
W	West
Apt	Apartment
Rm	Room
Ste	Suite
N	North
E	East
S	South
W	West

## Sources

Thanks to the following for supplying background information and sample data entry guides which were used in developing this tip sheet.

Action 4 Kids  
*Action4Kids Style Guide (2003)*

Metro GIS  
*Guidelines and Issues for working with Address Data (1997)*

United States Postal Service  
*Domestic Mail Manual (2004)*