



Database Clean-Up

Many of the Administrative functions in DonorSnap are located under the Maintenance menu. Remember that in DonorSnap each user at your location can have different levels of security (which options you can perform in the program). If you do not have access to the Maintenance menu or other options covered below, you will need to change your User Rights under **Maintenance > User Setup** or have your Site Administrator do it for you.

1. Customizing Drop-Downs

- a. All of the drop-downs within DonorSnap can be customized by you.
- b. Black “DonorSnap” fields for Contact Type, DonationType, Appeal, etc. under **Maintenance > Site-Setup > DonorSnap Site Lookups**
- c. Blue “User Defined fields”, if you have an added field for “Attributes” or “Volunteer Interests” under **Maintenance > Site-Setup > User Defined Setup**

2. Inactivating Contacts

- a. When a contact becomes deceased, or if you have not heard from a contact within a certain period of time
- b. On the **Contact** screen is the *Active* box. Simply **UN**-check to *Inactivate*.
- c. Under **Community > Contacts**, the list will automatically display the Active Contacts. In the top left of the grid, change this to Inactive or All, to view inactivated contacts.

3. Deleting Contacts

- a. When you add a Contact in error
- b. When you have duplicates where One of the records has NO activity (no donations or interactions or notes, etc.), you can delete one of the records
- c. ****Note that Deleting a Contact will remove all Donations, Notes, Interactions, etc. with one click. Be Careful.**

4. Merging Contacts

- a. When you have duplicates where BOTH records have “activity” (donations, interactions, notes, etc.), you must merge the records together.
- b. **Reports/Administrative Reports/Duplicates Report**



- i. Run the report a variety of ways to pull up duplicates. Print or Export to Excel to Save.
 - c. Research your contacts. The merge function **Does Not Merge Contact Data**. You must manually combine information on the Contact screen. Of the duplicates, CHOOSE ONE that will be the record to Save. The other record, if there is a phone number or email or other information on the contact screen, this information must be moved manually to the record to Save.
 - d. Perform the merge under **Maintenance/Merge Contact**
 - i. Choose the “Old” record to become Inactivated (DonorSnap will not delete this record)
 - ii. Choose the “New” record to merge the old information in to
 - iii. Verify the movement of activity records and click **Merge** at the bottom
5. Using the Excel Import tool for Mass updates to the **Contact Screen**

This allows you to make changes to any fields on the Contact screen – Name fields, Attributes, ContactType, etc. – on a mass basis, instead of having to change one record at a time. Note that this process only works for information on the Contact Screen – you cannot perform mass updates to Donations or other activity records.

 - a. Create a DataMinerPlatinum report of the fields you want to change
 - i. You **MUST** include the **ContactIPK** field in your Export
 - b. Export the report to Excel
 - c. Make changes to your data in the Excel spreadsheet
 - d. Save the report on your computer
 - e. **Maintenance/Excel Import**
 - i. Choose to **Update Contact Information**
 - ii. Upload your spreadsheet, choose the DMP sheet
 - iii. Move through the tabs until finally **Load Data**
 - f. Verify the results. ****Note**** You have two weeks to UNDO an import, but you must check it immediately. If you undo an import, all changes made to those contacts since the import will also be lost, and all imports between it and the present must also be reversed.
 - g. 5-minute Help Video under **Help/Help Videos**: [Update Contact Information with Excel Import Tool](#)