

Keystone Database Boot Camp Agenda

Session 1 - Overview & Getting Started

- **SESSION'S FOCUS ON FIVE MAJOR AREAS**
 - a. Duplicate Contacts
 - b. Old Contacts to be Purged
 - c. Edit/Merge Categories and FRA's
 - d. Database Maintenance
 - e. Addresses standardization and correction with a Demo of KeyAddress
- **Introduce Database Policy Questions**
- **Database Maintenance**
 - ScanDB, DB Copy, Back-up copy
- **Finding Duplicate Contacts using Filters**
 - Incomplete Names
 - Incomplete Addresses
 - Last modified date
- **Finding Volunteers with no activity using Filters**
 - Without hours, Interests/skills

Session 2 - Maintenance Items & Purging

- **Volunteer Hours Activities & Work Sites**
- **Clean up of Titles**
- **Clean up of Categories**
 - Is the original purpose of a category still valid?
 - Modifying Categories
 - Merge Categories
 - Delete Unused Categories
 - Committees, Donor & Volunteer
- **Purge Overview**
 - Quality Assurance Reports
 - Incomplete Names & Addresses
 - No Mail checkbox
 - ◆ The other No checkboxes
 - Tentative Purge Report
 - Review of the Purge Screen
 - "Click Through" and Blue box feature

Session 3 - Merging & Other Contacts

- **Fund Raising Activities**
 - Structure
 - Modifying FRA's
 - Unused FRA's
 - Merging FRA's
- **Merge Overview**
 - Individuals & Organizations
 - Review Quality Assurance Reports
 - Duplicate Names & Address Reports
- **Affiliations vs Organization records**
- **Discuss Important/Dignitary contacts**
 - How to make sure they are not purged
- **Deceased Donors / Volunteer**
- **Donor and Volunteer Reserved Categories**
- **Note: Do not use Address Case feature in Keystone without serious study**

Session 4 - Finishing Up & Demo

- **Review Export and Address Label report for Multi-Category Selection**
 - Category to Include or Exclude
 - Address Capitalization
 - No-Mail Selection
 - Email vs. Mail
- **Demo on KeyAddress**
 - Three Parts of KeyAddress
 - Export Review, fix address problems
 - Connect to service- NAICS Code for Habitat is 813410.
 - Import Review