Data Integrity and Data Entry Standards

Introduction

The goal is to create database records which are consistent, complete and accurate. This adds to the professional appearance of promotions received by members and prospects, helps to avoid the creation of duplicate names within the database, and maximizes our ability to reach individuals by mail, fax, email or phone.

General

1. All records are to be entered in upper and lower case letters. Do not enter any records in all upper case, unless a specific word, such as company name (i.e. IBM) is intended in all upper case. Rule of thumb, enter name and address information into the database as if you were typing a personalized letter.
2. A record is considered incomplete if it is missing any of the following criteria, and therefore, should not be entered until the missing criteria is obtained:
   - At the least one contact name (Prime)
   - Gender of Contact (Prefix)
   - Company Name
   - Street address
   - City
   - State
   - Zip code
   - Phone

   Other desired information include fax, phone extension, title, email address, number of employees, and SIC code.

Searching for Duplicates Prior to Entering a New Record

Before entering a record, the Company Name or Last Name should be searched to see if there is already a record for that company or individual.

If duplicates are found, steps should be taken to merge the duplicates.

Data Integrity and Data Entry Standards

Formatting for Key Fields

Prefix

A courtesy title should always be included on every individual record. The following are the only acceptable options available for use in the Prefix field. Prefixes are to be followed by a period. If the gender is uncertain we should do our best to obtain the information. It should not be left empty.

Mr., Mrs., Ms., Dr., Prof.

First Name

Do not abbreviate a person's first name with anything other than an initial. If an individual goes by his/her initial leave no spaces between them and use periods. If the person has a formal and informal name, choose only one, do not use both.

William   NOT   Wm.
Robert   NOT   Rob't
T.S. Elliot   NOT   TS Elliot   NOT   T S Elliot   NOT   T. S. Elliot
Charles **or** Chuck NOT   Charles "Chuck"

Last Name

Include punctuation on names like O'Leary. On "Mc", "Mac" or "O" names and do not skip a space between halves of names.

MacPhearson   NOT   Mac Phearson
McLaughlin   NOT   Mc Laughin
O'Leary   NOT   O' Leary

Names such as Van or Von should appear in the last name field and have an initial capital letter. A space should appear between the two words of the last name.

John Van Winkle   NOT   John VanWinkle

Middle Initial

Always enter a middle initial with a period following it.

Data Integrity and Data Entry Standards

Suffix

A Suffix can be included if the information is available but is not necessary. The following are the only acceptable options available for use in the suffix. Most suffixes are to be followed by a period, with Roman numerals being the exception. Remember, use a prefix Dr. or a suffix of M.D. or PhD, but not both. Do not put a comma before the suffixes because the database will automatically insert one when needed.

Jr., III, IV, M.D., PhD, Esq.

Title

When the titles are too long to fit the maximum field length, always choose to abbreviate the management level rather than the department. Department names such as Sales, Marketing, Engineering, should not be abbreviated.

Acceptable abbreviations are as follows but are only to be used when the entire title does not fit:

Vice President	VP	Supervisor	Sup.
Executive	Exec.	Senior	Sen.
Associate	Assoc.	Assistant	Asst.
Coordinator	Coord.	Specialist	Spec.
General	Gen.	Director	Dir.
Manager	Mgr.		

Company Name

1. Enter the Company Name exactly the way the company would like it entered. The company's prime contact is the authority when it comes to how we enter the name. One should always ask the contact how the company's name should be spelled, including any punctuation. If verbal confirmation is not available, one should follow the data entry standards, listed below, when entering the company name.

2. Spell out the entire Company Name whenever possible, even words "Corporation" and "Company". If the need arises they should be abbreviated including periods such as Inc., Corp. and Co. The following suffixes can be used with the Company Name.

    Inc., Co., Corp., Ltd., Ltda., LLP, BV, Sarl., GmbH, AG, SA, AS, NV, PLC, Pty., SPA

Data Integrity and Data Entry Standards

3. A Comma and a space should appear before "Inc.", "Ltd.", and "LLC."

4. Company names that contain initials use a different standard than individuals' names that use initials. Use periods in any company names only in the utilization of the abbreviations listed above or in the case when there is an additional word within the company name that is spelled out. Do not put spaces between initials in company names.

AT&T	NOT	A.T.&T.	NOT	A T & T
IBM Corp.	NOT	I.B.M. Corp.	NOT	I B M Corp.
BASF	NOT	B.A.S.F.	NOT	B A S F
A.B. Dick Co.	NOT	AB Dick Co.	NOT	A B Dick Co.

5. Hyphens (-) should be used when applicable without spaces before or after them:

   Hewlett-Packard   NOT   Hewlett - Packard

6. Slashes (/) should not be used, but replaced with Hyphens utilized as specified in #5 above.

7. When possible, try to consolidate the company name onto one line using abbreviations if necessary.

Address 1/Address 2

Do not use the Address 2 field if Address 1 is blank. Do not enter Suites (Ste) or other descriptive addresses for Address 2. If both address lines need to be used, the second address line needs to be the street number and name or the post office box.

417 Green Street, Ste 100	OR	Suite 100 417 Green Street	NOT	417 Green Street Suite 100

One Commerce Square 220 Commerce Avenue	NOT	220 Commerce Avenue One Commerce Square

For street numbers, use digits, not words to express numbers:

1 East Seventh Street	NOT	One East Seventh Street

Data Integrity and Data Entry Standards

Post office boxes should be expressed with punctuation, no spaces, and in upper and lower case characters:

P.O. Box 1574   NOT   POB 1574   NOT   PO Box 1574

Physical addresses should appear before P.O. Boxes:

1000 Longwater Circle   NOT   P.O. Box 1000
P.O. Box 1000   1000 Longwater Circle

The following abbreviations are acceptable:

Ave = Avenue	Hl = Hill	Mnr = Manor	Spg = Spring
Blvd = Boulevard	Hls = Hills	Pkwy = Parkway	Spgs = Springs
Cor = Corner	Holw = Hollow	Pike = Pike	Sq = Square
Cors = Corners	Hts = Heights	Pl = Place	St = Street
Ct = Court	Jct = Junction	Plz = Plaza	Ste = Suite
Cir = Circle	Lk = Lake	Pt = Point	Sta = Station
Dr = Drive	Lks = Lakes	Rd = Road	Ter = Terrace
Est = Estate	Ln = Lane	Smt = Summit	Trl = Trail
			Way = Way