

Best practices for data hygiene

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Good data makes HelpOne much more useful for everyone on your team. Follow these practices:

Avoid duplicates

- Always search for an existing contact or organization before creating a new one.
- Check slight variations in spelling or email addresses.

Be consistent

- Use consistent capitalization and naming (especially for organizations and campaign names).
- Agree as a team on how to enter phone numbers, addresses, and titles.

Keep information current

- Update email addresses and phone numbers when you learn of changes.
- Mark records as inactive instead of deleting them when possible (this preserves history).

Review regularly

- Before major campaigns or year-end reporting, review key lists for accuracy.
- Assign clear ownership for data quality so it does not fall through the cracks.

Clean data improves search results, reporting, mail merges, and the overall experience for everyone using HelpOne.
