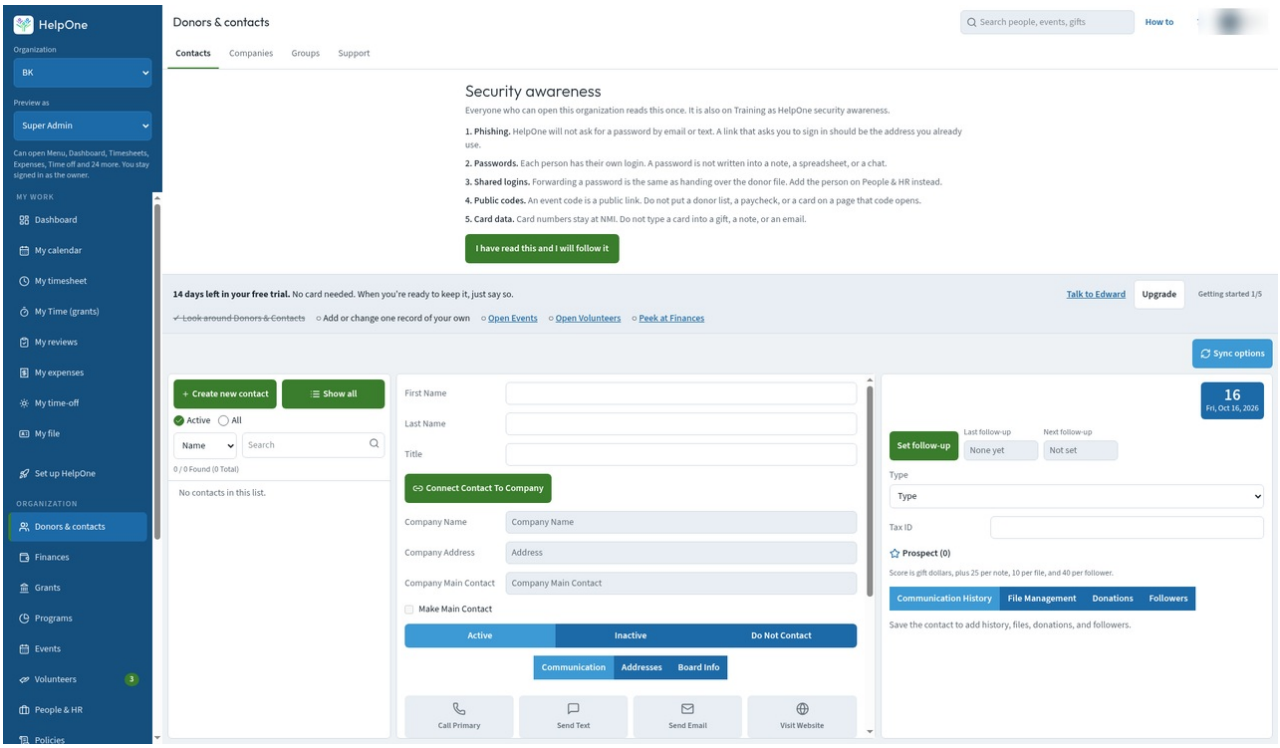
Best practices for data hygiene

Last Modified on 10/16/2026 6:57 am EDT

Clean data makes HelpOne more useful for everyone.

Avoid duplicates

- Search first. Use Search people, events, gifts in the top bar, or the Search box on Donors & contacts.
- Check spelling and email variations before you click Create new contact.



Be consistent

- Agree as a team on how to enter names, phone numbers, and addresses.
- Use the same company name every time.

Keep it current

- Update emails and phone numbers when they change.
- Mark people Inactive or Do Not Contact instead of deleting them. This keeps their history.

Review regularly

- Before year-end reporting, look over your key lists.
- When you're done testing, use Clear sample data so made-up records don't mix with your real ones.