

Watch All Videos Worksheet

Complete this worksheet and take notes as you watch the databank's basic training videos.

Video 1: Quick Start: Lookup a Member and Update their Record

Objectives

1. Look-up a record
2. Edit Contact Information
3. Create a Contact Note

Fill in the Blank

- _____ - _____ allows you to search by 5 characteristics.
- Click on the _____ button to update member contact information.
- To create a new contact note, enter the contact _____, _____, _____, _____, and any additional _____. Then click _____ to save the note.

Additional Notes

Video 3: In Depth: Member/Constituent Records

Objectives

1. Contact Information
2. Custom Fields
3. Contact Preferences
4. Deleting Records

Fill in the Blank

- There are two ways to edit a constituent's record: click on the _____ icon or click on the _____.
- The _____ is a unique number to the individual in your databank.
- _____ is a way to record how someone would have gotten into your databank.
- You can have up to _____ custom fields, with different data types.
- A contact record will automatically be updated to _____ if the email address doesn't exist or is undeliverable. You can manually change this back to OK, if needed.
- The only place to _____ a member record is on the contact information page, in the lower left corner.

Additional Notes

Video 5: Quick Start: Create a Mailing

Objectives

1. Select Members by Searching
2. Download Information for a Mail Merge
3. Create Mailing Labels
4. Add a Contact Note to Selected Records

Fill in the Blank

- The first step in creating a mailing is selecting the _____ to send the mailing to.
- Click on the _____ of members to make the results the current selection.
- Download the current selection by going to _____ then _____, and then select or deselect the criteria you want to download.
- _____ the records, to make sure each _____ only receives one letter from you.
- To create mailing labels, go to _____ then _____.
- To add a contact note to all members in current selection, go to _____ then _____. This is similar to adding a contact note to a single record, but applies to all contacts in the current selection.

Additional Notes

Video 7: In Depth: Viewing and Exporting Data

Objectives

1. Downloading
2. Viewing in a Roster Report
3. Viewing in Spreadsheet Software

Fill in the Blank

- To download your current selection, go to _____ then _____.
- The field delimiter is automatically set to _____.
- To view more information for multiple members at the same time, create a _____.
- To create a roster, click _____, _____ then _____.
- To download the roster, change the _____ from screen to downloadable text file.
- To open your downloaded file in Excel, open a new Excel document, navigate to the file you want to open (you may need to view All Files). Excel will open the _____, and you shouldn't have to change any information.

Additional Notes

Video 8: In Depth: Merging Duplicates

Objectives

1. EZ Merge
2. Manual Merge
3. Manually Locating Duplicates

Fill in the Blank

- To access the duplicate tool, go to _____, then _____.
- _____ over a member record to quickly see more information.
- To use the _____ option, select which record will be the master record with the radio button, then check the EZ Merge check boxes for the records you'd like to merge. Click EZ Merge, to combine the records and delete the duplicate record. All information will move to the master record.
- Click the _____ next to the record that is not a duplicate, to ungroup these potential duplicates.
- To see records side-by-side and manually merge records, click on the _____ of the record you would like to be the master. This opens the records side-by-side to compare.
- To copy information over to the master, click the _____ button to add the data. The green arrow will overwrite the existing data with new data.
- Add a number to the _____ field to manually locate and group duplicates. Then, go to the duplicates tool to merge these records.

Additional Notes
