



St. Louis Symphony Orchestra Tessitura Data Entry Standards

Philosophy: Customer data is one of the St. Louis Symphony Orchestra’s greatest assets. The more we know about our patrons, the better we can serve them. Maintaining accurate and consistent data provides personal, positive service and puts the patron at the center of our organization. Therefore, we have established the guidelines in this document to protect our information and keep it as uniform and complete as possible.

General Guidelines

To Fix or Forget: It is crucial each member of the SLSO staff take responsibility for the records we keep. Although there are moments in our day where it is impossible to take time to focus on the specifics of an account, try to make changes to accounts based on these guidelines in the moment you deal with them. Your contact with an account ensures that we will successfully reach our patrons in the future.

A1/A2 Standard: Used to indicate the two main individuals in a household. A1 is for the first main individual and A2 for the second. The names of the A1 and A2 individuals are used to generate the group name, sort name, and salutations for the primary affiliated group. They are also displayed first any time all affiliates are listed for the household. The A1 and A2 indicators can only be set for primary affiliations to household constituents. Household records have an A1 and an A2. It’s our standard to list the man of the household in A1 and the woman of the household in A2. Because we live in a changing world, there are always exceptions to this standard.

Name									
ID	Name	Status	Sort Name						
3765	Dolores Wente Household		Wente/Dolores						
Affiliates: 2	Affiliate ID	Prefix	First Name	Middle Name	Last Name	Suffix	Gender	Affiliation Type	A1/A2
	★ 319890	Mrs.	Dolores	B.	Wente		Female	Adult Member	A1
	★ 319891	Mr.	Floyd	B.	Wente		Male	Adult Member	A2

Only One Home Address: While some of our patrons may give us several addresses (home, business, season, business2, etc.), it is important to note that there should be only one active Home Address on a patron’s account at a time. If someone lives out of town for part of the year, that address should be entered as a Seasonal Address. If a patron prefers his/her SLSO mail to be delivered to a business address, please label the address as a Business Address and mark it as primary on the Address tab. These are just a couple of examples. In most cases, we mail patrons at their singular Home Address (marked primary in the Address tab and should appear in the General tab automatically).



Mailing Address			
Salutation 1:	Mrs. Dolores B. Wente		
Salutation 2:			
Organization:			
Street 2:			
Street 1:	[REDACTED]		
Locale:	Saint Louis	MO	63141-6315
Country:	USA	Home Address	
Dear:	Mrs. Wente		Gen Sal

When to make changes in the General tab:

If you need to edit a current, active mailing address for a patron (i.e. wrong apartment number, Street instead of Avenue, etc.), please make the edit directly in the General Tab. In these cases, the address was never correct to begin with.

When to make changes in the Contact Details tab:

General	Names	Contact Details	Worker Profile	Relationships	Research	Attributes
<input checked="" type="radio"/> Postal Addresses <input type="radio"/> Phones <input type="radio"/> Electronic Addresses <input type="radio"/> Contact Point Purposes <input type="radio"/> Logins <input type="radio"/> Contact Permissions						
Dolores Wente Household						
★ Home Address	Label	(314) 434-8740	E	ALL MONTHS		Created: 7/25/2003 00:00:00 by dbo at PATRICK6266
Saint Louis MO 63141-6315 USA	[FAX]	(314) 434-8740	E			Modified: 9/20/2012 04:01:34 by dbo

If a patron has moved to a new residence, please add this new mailing address in the Postal Address radio button on the Contact Details tab and inactivate the old address. This is important since it allows us to retain a history of previous addresses.



Postal Address

Owner: Dolores Wente Household

Type: Home Address Primary Label Inactive

Salutation: (none) Label Inactive

Organization: _____

Street 2: _____

Street 1: _____

Locale: Saint Louis MO 63141-6315

Country: USA

Start Date: 00/00/0000 End Date: 00/00/0000

Months: Jan Feb Mar Apr May Jun
 Jul Aug Sep Oct Nov Dec

Day/Eve Telemarket

Phone 1: (314) 434-8740 x	Eve	<input type="checkbox"/>	Purposes
Phone 2: () - x		<input checked="" type="checkbox"/>	Purposes
Phone (314) 434-8740 x	Eve	<input type="checkbox"/>	Purposes

Append Purposes:
no purposes selected

Created: 7/25/2003 00:00:00 by dbo at PATRICK6266 Modified: 9/20/2012 04:01:34 by dbo

Save Cancel

Please update phone numbers on the General tab only. We want to keep phone numbers and addresses in two separate areas within the account. See the instructions on phone entry for more details.

Formatting note: Please use abbreviations in addresses without periods (St, Ave, No, Ste, etc.), and use upper/lowercase when typing in names, address, etc.



Name Fields

Name										
ID	Name	Status	Sort Name							
3765	Dolores Wente Household		Wente/Dolores							
Affiliates: 2	Affiliate ID	Prefix	First Name	Middle Name	Last Name	Suffix	Gender	Affiliation Type	A1/A2	
	319890	Mrs.	Dolores	B.	Wente		Female	Adult Member	A1	
Add Affiliate	319891	Mr.	Floyd	B.	Wente		Male	Adult Member	A2	

- **Prefix:** By default, use “Mr.” for a man and if marital status is unknown for a woman, use “Ms.”
- **First Name:** Always use the formal first name here; put alternate names in Alias on Names tab. For example, for James, you can put —Jim and —Jimmy in aliases; for Margaret, you can put —Peggy; or for nicknames like Bud, Skip, etc.
- **Middle Name:** Include middle initial, if known, and use a period; enter full middle name only upon patron request. Multiple middle initials are separated with a space.
- **Last Name:** NO SUFFIXES in this field, only the actual last name.
- **Suffix:** Use upon patron’s request.
- **Gender:** Use, when known, but especially if the prefix is gender-neutral (i.e. Dr., Hon., etc.)
- **Status:** Status is a field that exist on the individual record – not the household record.

Name									
ID	Prefix	First Name	Middle Name	Last Name	Suffix	Gender	Status	Sort Name	
319890	Mrs.	Dolores	B.	Wente		Female		Wente/Dolores	

“Deceased” – This status is used after thorough research is completed by the Philanthropy Department. For this reason, **only the designated person in the Philanthropy department should ever set the status to Deceased.**

General											
Names		Contact Details		Worker Profile		Relationships		Research		Attributes	
Name											
ID	Prefix	First Name	Middle Name	Last Name	Suffix	Gender	Status	Sort Name			
319890	Mrs.	Dolores	B.	Wente		Female		Wente/Dolores			
Mailing Address						Phone					
Salutation 1: Mrs. Dolores B. Wente						? Deceased ?					
Salutation 2:						Deceased					
Business Title:						Type	Pho	Day/Eve	Telemarket		
Organization:						Phone 1	(314	Eve	<input type="checkbox"/>		
						Phone 2	()		<input checked="" type="checkbox"/>		
						Phone Append	(314	Eve	<input type="checkbox"/>		

If SLSO has no active relationship with the patron, you may use the **?Deceased?** status to flag this record as a record that Philanthropy should possibly decrease. This is also appropriate when you have been informed of the death. Pairing this status with a CSI will alert Philanthropy to confirm the patron is indeed deceased and will provide additional information they might find useful. A CSI can be added from any constituent record via tools → add new customer service issue or via the record’s connections tab.

When one member of the household passes away, the status gets notated on the individual record. There are some fields to be edited on the household record which is also handled by Philanthropy. See the deceased policy for more information on this topic.



Aliases

Overview: Aliases are alternate names that enhance the search ability of a patron’s account.

There are three alias fields:

- **Alias First Name** – A first name as it should appear for inclusion in a first name search. In order for alias first name searches to be effective, an alias last name should always accompany the first name.
- **Alias Last Name** – A last name as it should appear for inclusion in a last name search, or the name of the searchable organization. For a business, this is where acronyms can be added such as IBM, ATT, etc.
- **Alias Type** – This is currently unused.

Mailing Address: Salutation Fields

- **Salutation 1:**
 - Single Person: Ms. Sara Coleman
 - Widowed: Abide by Patrons request as to using the husbands last name
 - Couple w/ Different Last Names: Mr. Arthur Kent and Dr. Helen Miller if different last names, the **Salutation 2** field is used
 - Two Dr.’s w/ different last names: Dr. Smith and Dr. Jones
 - Two Dr’s same last name: Drs. John and Mary Smith
- **Bus. Title:** Enter the person’s Business Title if you know it
- **Dear:**
 - Single Person: Ms. Coleman
 - Widowed: Abide by Patrons request as to using the husbands last name
 - Couple w/ Different Last Names: Mr. Kent and Dr. Miller if different last names, the **Salutation 2** field is used
 - Two Dr.’s w/ different last names: Dr. Smith and Dr. Jones
 - Two Dr’s same last name: Drs. Smith
- **Str. Address:** Use abbreviations but no periods (St, Ave, Blvd, Dr, etc.)
- **Locale:** Enter the Zip+4 if you have it

When the address is unknown, We typically use Unknown as the street address, with a zip code of 00000.

Mailing Address			
Salutation 1:	John R. Abaray		
Salutation 2:			
Business Title:			
Organization:			
Street 2:			
Street 1:	Unknown		
Locale:	No Mail	XX	00000-
Country:	USA	Home Address	



Phone Numbers

Overview: Phone numbers should be treated separately from mailing addresses. In today’s world, many people maintain only a cell phone, which moves with them from one residence to the next. Other people transfer their home line with them to each new residence. And sometimes, people like to get their mail at home but prefer to be contacted via phone at work during the day.

In short, the general tab should reflect both the preferred address and preferred method of phone contact, although these two aren’t necessarily linked to the same location.

What it should look like:

The general tab holds the household phone number in the case of households. In the case of individuals, it is fine to put a wireless number on the general tab as phone1 and then enter it again as the wireless number in the field below.

- The Phone 1 field should contain the preferred phone number for the account (regardless of the phone number type). This is supplied by the patron. The preferred phone number listed in the Phone 1 field should also be listed in the bottom section with the correct descriptor (Business, Cell Phone, Fax, Home, Seasonal, etc).
- The Phone 2 is generally used as a secondary evening phone line.
- The Phone 3 is from the phone append process and should be considered the more reliable phone number if Phone 1 is empty. No one should ever manually enter or change this number.
- Add other phone numbers, per the patron’s request, and label them using the drop down descriptors.

Phone			
Type	Phone Number	Day/Eve	Telemarket
Phone 1	(314) 434-8740 x	Eve	<input type="checkbox"/>
Phone 2	() - x		<input checked="" type="checkbox"/>
Phone Append	(314) 434-8740 x	Eve	<input type="checkbox"/>
Type	Phone Number	Day/Eve	Telemarket
		<input type="button" value="Add"/>	<input type="button" value="Delete"/>

Email Addresses

Overview: Always verify or update an email address every time you speak with a patron. Emails are entered in the Contact Details Tab by clicking on the Electronic Addresses radio button and typing it into the Address field. Multiple email addresses may be entered and a type is indicated (Business email, Personal email, and



twitter handle), but one must be made primary.

Electronic Address ? X

Owner: Dolores Wente

Address:

Type:

Salutation: Business Email
Personal Email
Twitter Handle

Start Date:

Months: Jan
 Jul

Business Name 1
Business Name 2
Name 1

Primary **Inactive**
 DEV indicato **Allow Marketing**

Purposes:
no purposes selected



Contact Preferences on Attributes Tab

Overview: It is crucial that we adhere to patrons contact wishes, for both legal reasons and to keep our patrons happy. A patron may specifically ask that they not be contacted by a certain method or about a certain topic. Many times, this just means they do not want to receive marketing materials or fundraising letters/solicitations.

Please use the following Contact Preferences on the Attribute tab → Attributes Radio Button to help keep our patrons happy. You can be granular using the Attribute Value by selecting from the list, i.e. Dev-No Telefunding, Mktg – Do Not Email, Dev – Do Not Contact.

The screenshot shows a software interface with several tabs: General, Names, Contact Details, Worker Profile, Relationships, Research, and Attributes. The 'Attributes' tab is active, indicated by a green arrow. Below the tabs, there are radio buttons for 'Attributes', 'Interests', and 'Constituencies', with 'Attributes' selected. A table lists attributes for 'Dolores Wentz', including 'Age Append' (January 1931) and 'Marital Status' (Widowed). A dropdown menu is open on the left, listing various attribute types, with 'Contact Preferences' highlighted in green. A red 'X' icon is visible next to the 'Marital Status' entry.

Attribute	Attribute Value	Created	Modified
Dolores Wentz			
Age Append	January 1931	Created: 3/29/2012 00:00:00 by Experian at MATT	Modified: 8/3/2012 19:46:38 by dbo
Marital Status	Widowed		Modified: 8/3/2012 19:46:38 by dbo

If the patron knowingly remains active with the SLSO in a specific capacity, we continue to mail them important items related to their activity, like subscription renewal packets and/or donor correspondence.