



Maintaining a Healthy & Clean Database

Keeping your GrowthZone AMS and ChamberMaster / MemberZone data accurate, the reports you rely on are too.

Customer Training · September 2026



Clean data, better decisions

Cleansing your data raises its quality — and everything downstream depends on it.

Dirty data quietly erodes everything you do in your database.

When records are duplicated, missing, or out of date, your emails miss people, your reports mislead you, and your team wastes time double-checking what the system should already know.

Cleaning it up gives you the highest-quality information to work from — and confidence in the numbers you report to your board.

The good news: maintained on a schedule, cleanup takes minutes, not days.

94%

of organizations suspect their
customer data is inaccurate

\$3T

lost each year to poor-quality
data (estimated)

Sources: Experian, IBM. Industry estimates — shown to make the case, not to measure your own database.



What “dirty” data looks like

Five kinds of bad records creep into every database.

Duplicate

The same business or contact entered more than once — often from online applications, imports, or event registrations.

Missing

Blank fields you actually need — no email address, no billing contact, no physical address.

Outdated

Right once, wrong now — a moved office, a new business name, or a former rep still on the record.

Incomplete

A record that was started but never finished, so it can’t be used for billing or communication.

Inaccurate

Typos and wrong entries — a misspelled email, the wrong status, or a bad phone number.

Five steps to a clean database

The same five moves work in both platforms — we'll show each side by side.

- 1 Identify & merge duplicate records
- 2 Find missing & inaccurate data
- 3 Ask members to update their own information
- 4 Clean up invalid email addresses
- 5 Review membership status & standing



Do it on a cadence

Pick a rhythm that fits your organization — monthly or quarterly — and keep to it.

Work top to bottom: clean duplicates first, because a “missing” or “wrong” record is often just the duplicate you were looking at.

Maintained regularly, each pass is quick.

Two platforms, one playbook

Where each tool lives under your product — so everyone can follow along.

YOU’LL HEAR US SAY...	GROWTHZONE AMS	CHAMBERMASTER / MEMBERZONE
The database record	Contact	Member / Representative
The workhorse report	Contacts Report	Custom Member Report
Member self-service	Info Hub	Member Information Center (MIC)
Where members live	Memberships Rail	Members module
Sending email	Marketing & Communications Rail	Communication module



Identify & merge duplicates

Duplicates are first — clean them before anything else, or you'll “fix” the wrong record.

GROWTHZONE AMS

Contacts Report — pick fields, then export

→ Reports › Contacts Report

- Display Name, Created Date, Email & Membership Status.
- Export to Excel → Conditional Formatting › Highlight Cells › Duplicate Values.
- Merge the oldest record into the newest.



KB [Merge Contacts](#)

CHAMBERMASTER / MEMBERZONE

Name	Email	Status
Big Foot Shoe Shop	11/7/2022 shoes@mailinator.com	3478 Portage
Black Diamond Advertising	3/22/2018 blackdiamond@mailinator.com	128 w 8th st
Boulder City	5/28/2019 boulder@mailinator.com	P.O. Box 188
Cakes by Katie	9/1/2022 katiecakes@mailinator.com	657 First Street
Car Dealership	11/11/2023	
Casino	3/24/2024 jack@mailinator.com	
Clearance Window Repair	11/1/2022 windowrepair@mailinator.com	
Crystal Clear Window Washing	12/19/2023 crystal@mailinator.com	
Custom Cabinets	5/18/2022	8584 City Road 2
Dana's Fashion Boutique	9/7/2022 danas@mailinator.com	202 N Rose Street
Diephouse Realty	9/1/2022 mwee@mailinator.com	1903 W. Michigan
Diephouse Realty	12/2/2022	P.O. Box 46
Drish's Fireworks	5/30/2023 drish@mailinator.com	Ulysses
Discover Kalamazoo	9/1/2022 discoverkalamazoo@mailinator.com	Drish Mite
Elizabeth's Creations	9/8/2022	Lenny West
Emma's Kitchens	5/7/2022	
Emma's Kitchens	3/21/2018 emmas@mailinator.com	
Furniture Store	1/7/2023	
Gabby's Dry Cleaning	10/4/2022 gabbydrycleaning@mailinator.com	3081 W. Michigan
Gary's Sutures	4/7/2018 garysutures@mailinator.com	343 Farmers Alley
Happy Days Child Care	3/22/2018 fdcc@mailinator.com	351 Main
Jane's Coffee Shop	2/24/2023	
Jane's Juice Joint	3/28/2023	
Jane's Juice Joint	8/22/2018	
Joe's Crab Shack	4/4/2018 joescrabshack@mailinator.com	
Joe's Voice Lessons	5/7/2022 joesvoicelessons@mailinator.com	
Joe's Bakery	2/10/2023	70978 East Street
Joe's Bakery	11/30/2022	Joe's Bakery
Kalamazoo Animal Shelter	12/1/2022 kalamazoosanimalshelter@mailinator.com	
Kalamazoo Aquarium	12/18/2023 maureen@mailinator.com	
Kalamazoo Brewery Tours	9/7/2022 kbtoours@mailinator.com	
Kalamazoo Candy Store	11/2/2022 kalamazocandy@mailinator.com	3456 W Main
Kalamazoo Candy Store	11/2/2022 kalamazocandy@mailinator.com	Kalamazoo Candy

Custom Member Report in Excel — duplicates highlighted

→ Reports › Custom Member Report

- Company Name, Join Date, Email & Status.
- Download to Excel → Conditional Formatting › Duplicate Values.
- Open the member's General tab → Merge Into.

KB [Merge Members](#)

Find missing & inaccurate data

Decide what every record must have — then let a report surface the gaps.

GROWTHZONE AMS

Additional Criteria / Filters

+

X Membership Billing Contact Name,

▼

Is Empty

▼

X

Contacts Report — the “Is Empty” filter

→ Contacts Report or Membership Report

- Add a field (e.g. Billing Contact Name) and set the operator to Is Empty.
- The report returns only records missing that field.
- Run monthly to catch new blanks early.



KB [Contacts Report](#) or [Membership Report](#)

CHAMBERMASTER / MEMBERZONE

Print Report Print PDF Create Group

CP Billing Contact Info		
Company Name	Billing Contact	Billing Email
A & T Baseball	Skinny Harold	skinny@mailinator.com
A Place for Dogs	Shannon Jones	cheri.petterson@growthzone.com
abcd		
Acorns	Wally Main	
Addams and Sons	Mark Addams	
Alex Race Track Events LLC		
Beautiful Home Remodeling	Peter Mays	cheri.petterson@growthzone.com
Best Company	Joan Larsen	
Cakes by Stefani		stefan@mailinator.com
Cheri's Dog Boarding	Cheri Test	
Chewy Chewy	Lance Chewy	chewchew@mailinator.com
Danico's	Tony Danico	
Dogs R' Us		loisl@mailinator.com

Custom Member Report — blanks reveal what’s missing

→ Reports › Custom Member Report

- Pick the fields you require, then add Criteria with the Is Empty operator.
- Filter by Member Status to work one group at a time.
- Save the report and rerun it each cycle.

KB [Custom Member Report](#)

Let members update their own info

Your members are the best source of truth — make it easy for them to keep it current.

GROWTHZONE AMS

To send individually, use the Communication tab in a contact. Send Email and select the Member Profile Update email template.

Summary

Template: Member Profile Update

From: *

To: *

SEND EMAIL

SEND PREVIEW

Type: Note, Note, Automated Gen, Note, Email, Email

Actions: ...

Two Options- in Bulk (all members) or individually (one member at a time)

Bulk → Contacts › All Contacts › Email Member Profile Update

- The Member Profile Update template is already selected.
- Members review and correct their own details.
- No Info Hub login required to respond.

Individual → Contacts › Open Contact › Communication tab › Send Email

- Choose the Member Profile Update template.
- Members review and correct their own details.
- No Info Hub login required to respond.



K B [Member Profile Update \(Bulk\)](#) or [Send An Individual Email \(Individual\)](#)

CHAMBERMASTER / MEMBERZONE

Dear A Place for Dogs,

Changes happen. Have you updated your member information recently? You should be updating the Member Information Center at least every 3 months.

Your membership provides excellent opportunities for your organization to attract new customers and share information with our community, the region and even internationally. Don't frustrate your customers - make sure everyone has access to complete, up-to-date information!

Important: Completing your profile is critical to gaining increased visibility and exposure!

Take a few moments to review your information below and then access the online Member Information Center to make changes.

Our Records:

Company Name:	A Place for Dogs
Primary Phone:	(218) 646-5413
Physical Address:	21748 S Rucker Court Winona, MN 55997
Mailing Address:	21748 S Rucker Court Winona, MN 55997
Billing Address:	Kase Brady 24 Main Street Norwau, MN 55465
All Representatives:	Edu Alvar Luis Armstrong Bibi Bowman Kyrstal Bowman Kase Brady Chad Bing Jack Jones Mark Piller

Update Your Membership Listing — “Our Records”

→ **Communication › New Email to Multiple Members**

- Use the Update Your Membership Listing template.
- It shows members what your records currently hold.
- A login link sends them to the MIC to make changes.

K B [Send a Mass Email](#) and [Send Email Using an Email Template](#)

Clean up invalid emails

Bad addresses stop your messages and drag down your sender reputation — fix them before any mass send.

GROWTHZONE AMS

Re-Check and Validate Email Address

→ Failed / Invalid Email Report

- Open an address and pick an action: Mark as valid, Recheck, or Edit and recheck.
- Correct real members' addresses so your email reaches them.



KB [Manage Invalid Email Address](#)

CHAMBERMASTER / MEMBERZONE

Action	Email	Quarantine Reason	Quarantine Date	Mem ID	Member
Re-Check Change MarkAsGood	info@XYZ.COM	Selected email, SMTP server rejected email, the email account doesn't exist	7/20/2019	36	XYZ General Store
Re-Check Change MarkAsGood	jwenz@depheuserrealty.com	No MX Record, MX record of the domain doesn't exist.	10/21/2022	124	Depheuse Realty
Re-Check Change MarkAsGood	mwest@depheuserrealty.com	No MX Record, MX record of the domain doesn't exist.	10/21/2022	124	Depheuse Realty
Re-Check Change MarkAsGood	ed@eacy.com	No MX Record, MX record of the domain doesn't exist.	7/26/2019	16	MicroMachines of West H
Re-Check Change MarkAsGood	sen@mailinator.com	No MX Record, MX record of the domain doesn't exist.	7/26/2019	40	The Dye Designs

Action	Email	Quarantine Reason	Planned Quarantine Date	Mem ID	Member
Re-Check Change Quarantine Tonight	crystal@mailinator.com	Invalid email address: may contain invalid characters or is incomplete	2/22/2024	127	Cry

Quarantined Invalid Email Addresses report

→ Task List › Invalid Emails OR → Reports › Quarantined Invalid Email Addresses

- Review the Quarantine Reason for each address.
- Use Re-Check, Change, or Mark as Good in the Action column.
- Don't mark a bad address good — it hurts sender reputation.

KB [Manage Quarantined Emails](#)

Review membership status

Make sure everyone shown as active truly is — status accuracy keeps your reporting honest.

GROWTHZONE AMS

Memberships

Memberships Submitted Applications Renewals **Unpaid** Bulk Action Tracking

Search...

X Days Overdue: 1+

Contact Name	Primary Contact	Invoice Date	Ref #	Aging	Due Date	Balance	Membership
Jeffrey Jones	Greenery	1/16/2023	10	717	1/16/2023	\$2,660.00	General Memb
Adam Anderson	Adams & Associates SAMPLE	9/8/2023	100	482	9/8/2023	\$875.00	Gold Member
Camp Creek	Eddie Regent	9/8/2023	102	482	9/8/2023	\$1,225.00	Automatic Levels Formula

ADD LATE FEES

- Drop Members
- Add To List
- Email Invoices
- Print Invoices

Find Overdue Members and Drop in Bulk

→ Memberships › Unpaid

- Filter by Days Overdue to see who hasn't paid.
- Use filters to select specific members and use Drop Members for long-unpaid dues.



KB [Manage Unpaid Membership Dues](#)

CHAMBERMASTER / MEMBERZONE

A/R Aging Summary

Filter Options

Report Date: 9/25/2026
Interval: 30 days
Report Through: 120 days past due
Specific Batch: Choose a Batch (optional)
Include voluntary fee items in balance: ☐
Don't include payments in balance: ☐

Item Type: Member Fees/Dues
Item Basis:
A/R Account:
Show Active/Courtesy members only: ☒
Don't include payments in balance: ☐

Refresh Report Print Report Print PDF Download Report Reset Options

A/R Aging Summary Report
September 25, 2026

Member Name	Current	1 - 30	31 - 60	61 - 90	91 - 120	> 120	Total
A Place for Dogs	0.00	0.00	0.00	0.00	0.00	-2000.00	-2000.00
ANIMAL SHELTER	0.00	0.00	0.00	0.00	0.00	1959.40	1959.40
Bay Lake Charter School	0.00	0.00	0.00	0.00	0.00	1200.00	1200.00
Bay Lake Realty	0.00	0.00	0.00	0.00	0.00	2092.00	2092.00
Bert's Brewery	0.00	0.00	0.00	0.00	0.00	-1000.00	-1000.00
Boulder Gifts	0.00	0.00	0.00	0.00	0.00	146.67	146.67
Books and Bites	0.00	0.00	0.00	0.00	0.00	-500.00	-500.00
Bonnie Remodeling	0.00	0.00	0.00	0.00	0.00	-850.00	-850.00

Check for Overdue Membership Balances, then drop members

→ Reports › Accounts Receivable Aging Summary

- Filter to your desired interval and Item Type (Member Fees/Dues Only)
- Review and adjust any other filters as needed
- Go to Member records and drop as needed

KB [Accounts Receivable Aging Summary](#) and [Drop a Member](#)

Build the habit

A little maintenance often beats a big cleanup rarely.

- 1 Pick a cadence — monthly or quarterly — and put it on the calendar.
- 2 Start with duplicates, then work down the five steps.
- 3 Set data-entry standards so every staff member enters records the same way.
- 4 Re-run your saved reports each cycle and fix what surfaces.



Why it sticks

Consistency beats intensity.

Keep this up and your reports, emails, and member records become something you can trust — without a dreaded once-a-year scramble. The same discipline works whether you're in GrowthZone AMS or ChamberMaster / MemberZone.

LET'S TALK

Questions?

We'll leave time to look at your own database and answer whatever comes up.

