ViGlob 360

Your Pre-Summer CRM Clean-Up

15 CHECKPOINTS

A clean database means a stress-free return.
Before you sign off for the summer, check off each item on this list as you complete it in ViGlob 360 : a few minutes now will save you a great deal of time when you return!

1. Your Members, Contacts and Clients

- [ ] **Check for duplicates in the database**
  Use the duplicate search tool in the admin panel, then merge the affected records.

- [ ] **Update missing or incorrect contact information**
  Export your database to Excel and sort by key fields (email, phone, address) to spot anomalies.

- [ ] **Validate membership statuses**
  Active, expired, pending approval, inactive: use "Member List Actions" to make corrections in just a few clicks.

Well done!
Your first 3 items are checked off.
You're on the right track!

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2. Administrator Access

- [ ] **Deactivate access for former employees or volunteers**
  A departure without deactivation = a security risk. Activity history is retained, but login is blocked.

- [ ] **Review the access level of each active user**
  Apply the principle of least privilege: not everyone needs full administrator access.

- [ ] **Document who has access to what (and why)**
  A shared table (name, role, access level) prevents many headaches during summer absences.

- [ ] **Confirm access for summer replacementsaux**
  Make sure the person covering for you has access to what they need, no more, no less.

- [ ] **Activate the new task management module**
  Now available in ViGlob 360. Email our support team and come back from vacation with one more tool!

Great job!
8 of 15 items completed!
Keep going, you're halfway there.

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3. Your Data and Forms

- [ ] **Archive past events**
  Completed events clutter the interface. Archive anything older than six months.

- [ ] **Prepare your forms ahead of your return**
  Create your September forms now in draft mode. All you'll need to do is activate them when you're back from vacation.

- [ ] **Review unused custom fields in your records**
  Fewer fields = a more readable member record. Deactivate anything no longer in use.

Excellent!
11 of 15 items completed!
The finish line is in sight!

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4. Your Communications and Automations

- [ ] **Review active automated emails**
  Confirmations, reminders, welcome messages: check the tone, links and layout using the "Message Flowchart" module..

- [ ] **Plan your return communications in advance**
  September newsletter, renewal announcements: write them now and schedule them.

- [ ] **Send a test email before you leave**
  Send yourself a test email to check the layout, logo, links and footer.

- [ ] **Prepare a news post for your returnes**
  Write your news post now and save it as a draft. When you're back, all you have to do is publish!

Congratulations!
All 15 items are complete!
ViGlob 360 is ready for summer! ☀️