

9.1.3 Keeping your bowler database organized

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best practice

A well-organised bowler database is one of the most practical assets a pro shop can build over time. In Spectre Cloud, organisation is not imposed by the system — it is something the operator builds through consistent habits applied visit by visit. A database that is clean, consistently named, and actively maintained pays back every time a returning bowler walks through the door. One that has grown without discipline becomes a source of confusion and errors. This page covers the habits and practices that keep the bowler database useful as it grows.

☐ Naming Conventions for Bowler Profiles

The bowler's name is the primary field used to search and identify profiles. Consistent naming across the database makes search results reliable and eliminates the ambiguity that leads to duplicate profiles.

- ☐ **Use full legal name** as the primary name field — first name and last name in full. Nicknames, preferred names, or short forms can go in the Notes field.
- ☐ **Consistent capitalisation** — enter names with standard title case (John Smith, not john smith or JOHN SMITH) so the profile list sorts and reads consistently.

- **For bowlers with the same name** — add a distinguishing detail to avoid confusion. A birth year in brackets (John Smith (1978)), a location (John Smith — Eastside), or a league affiliation (John Smith — Thursday Men's) makes the two profiles immediately distinguishable without searching through their spec sheet history to tell them apart.
- **For junior bowlers** — consider noting the parent or guardian's name in the Notes field, particularly for younger children whose profiles may otherwise be hard to locate when a parent calls on their behalf.
- Do not create profiles with first name only — a database full of single-name entries becomes unsearchable as it grows.
- Do not abbreviate last names — John S. is not a useful record when a different John S. joins the database six months later.

☐☐ Searching the Database Effectively

Spectre Cloud's bowler search matches against the name field. Getting the most out of it requires knowing how it works and what it does not do:

- **Search by partial name** — entering the first three or four letters of a last name narrows the list quickly without needing to spell the full name correctly.
- **Search by first name** if the last name is unknown or uncertain — useful when a bowler calls and gives only a first name.
- **Try alternative spellings** if a search returns no results — a name entered as MacDonald will not appear in a search for McDonald. Check both spellings before concluding the bowler has no profile.
- **Search before creating** — every time, without exception. The habit of searching first is the single most effective preventive measure against duplicate profiles.
- Do not rely on the phone number or email field for searching unless Spectre Cloud explicitly supports searching by those fields — confirm the search behaviour with the Spectre team and update your intake process accordingly.

☐☐ The Notes Field — What Belongs There

The Notes field on a bowler profile is a flexible free-text space intended for information that helps any staff member serve that bowler well. Used consistently, it becomes a concise briefing document that makes every return visit faster and more personalised. Used inconsistently, it becomes a mix of useful information and irrelevant clutter that staff stop reading.

The following categories of information belong in the Notes field:

- **Dominant hand** — the single most important note for a new profile. Confirm and record it at the first fitting.
- **Grip type preference** — particularly if the bowler has a strong preference or has previously had issues with a specific grip type.
- **Physical considerations** — arthritis, injury history, unusual hand geometry, or anything that affects the fitting approach. Record factually and respectfully.
- **Communication preferences** — prefers text over call, or vice versa. Ball-ready notification method.
- **Equipment preferences** — ball weight, surface preferences, brands the bowler likes or dislikes.
- **Service notes** — anything relevant to how the bowler interacts with the shop: pays upfront, picks up promptly, needs extra time during fittings.

The following do not belong in the Notes field:

- Drilling details — these belong on the spec sheet, not the profile notes.
- Sensitive personal information beyond what is relevant to the fitting relationship.
- Subjective personal comments about the bowler that you would be uncomfortable showing them.
- Temporary reminders that are no longer relevant — clear outdated notes periodically so the field stays useful.

Managing Duplicate Profiles

Duplicate profiles are the most common database integrity problem in Spectre Cloud. They happen when a staff member creates a new profile without searching first, or when a bowler's name is spelled differently on two visits. Once duplicates exist, the bowler's spec sheet history is split across two records and neither is complete.

Preventing duplicates

- Search before creating — every time, for every bowler.
- Train all staff to follow the same intake procedure — a duplicate created by a new staff member is just as disruptive as one created by an experienced one.
- When a bowler is uncertain whether they have a profile, search by first name, last name, and common alternative spellings before concluding they are new.

Resolving duplicates when found

Spectre Cloud does not have an automatic profile merge function. When a duplicate is identified:

1. Identify which profile is more complete — typically the one with more spec sheets and a fuller Notes field.
2. Open the less complete profile and note any spec sheets or information it contains that are not in the primary profile.
3. Manually recreate any missing spec sheets on the primary profile if the drilling history is worth preserving — use the information from the duplicate as the source.
4. Add any unique notes from the duplicate profile to the primary profile's Notes field.
5. Once the primary profile is complete, delete the duplicate.
6. Confirm the deletion removes only the duplicate profile and not the primary — open the primary profile after deletion to verify it is intact.

☐ **Note:** Contact the Spectre support team before deleting profiles if you are uncertain — deletion is permanent and cannot be undone. If in doubt, rename the duplicate with a clear marker (e.g., `John Smith — DUPLICATE — do not use`) and leave it inactive rather than deleting immediately.

☐ Keeping Bowler Status Current

Not all bowlers in your database are active customers. Over time, the database naturally accumulates profiles for bowlers who have moved away, stopped bowling, or passed away. Keeping these records does not harm the database — Spectre Cloud has no record limit — but a database that mixes active and long-inactive profiles requires more filtering during searches.

- ☐ **Keep inactive profiles** — do not delete a bowler simply because they have not visited recently. Their spec sheet history has value if they return, and deletion is permanent.
- ☐ **Note inactivity in the profile** — a brief note such as `Moved away — June 2023` in the Notes field signals to any staff member that this profile is historical without requiring them to open the spec sheet history to understand the context.
- ☐ **Update contact details when they change** — a bowler who mentions a new phone number or email address during a visit should have their profile updated before they leave the counter.

☐ Multi-Staff Database Discipline

In shops where multiple staff members create and edit bowler profiles, consistent habits matter more than in a solo operation — inconsistency introduced by one person affects every other person who uses the database.

- ☐ **Document your naming convention** — write it down and make it available to all staff. A one-page intake procedure covering profile creation, naming, and notes standards

is enough.

- **Review new profiles periodically** — a monthly check for duplicates, incomplete profiles, or naming inconsistencies takes fifteen minutes and prevents the database from degrading over time.
- **Assign one person as the database owner** — in shops with several staff members, having one person responsible for database quality means inconsistencies get caught and corrected rather than accumulating indefinitely.
- **Include database standards in staff onboarding** — a new staff member who learns the intake procedure correctly from day one is far less likely to create duplicates or naming inconsistencies than one who develops their own habits by observation.

☐ Multilingual Shops

In shops serving bowlers in more than one language, the bowler database may contain names in multiple scripts or with diacritical characters. A few additional considerations apply:

- **Enter names in the bowler's preferred form** — accented characters (é, ü, ñ) should be entered correctly rather than replaced with unaccented equivalents. Spectre Cloud supports Unicode entry.
- **Search with and without accents** — if the search function treats **e** and **é** as different characters, a name entered with accents will not appear in a search without them. Test search behaviour for your specific language combination and adjust intake instructions accordingly.
- **Notes field language** — staff members may add notes in different languages in a multilingual shop. This is acceptable as long as the notes remain useful to all staff — consider using a shared language for notes if the shop serves a primarily bilingual customer base.

☐ Periodic Database Maintenance

A bowler database maintained only at the point of entry drifts toward disorder over time. A brief periodic review — monthly in a busy shop, quarterly in a quieter one — keeps it reliable:

- **Scan for obvious duplicates** — sort the bowler list alphabetically and look for names that appear more than once. A visual scan takes a few minutes and catches most duplicates.
- **Check for incomplete profiles** — profiles with no spec sheets, no contact information, and no notes are usually test entries or incomplete intake records. Investigate and either complete or delete them.
- **Update stale contact information** — phone numbers and email addresses change. A periodic reminder to bowlers to confirm their contact details — at the start of a new

season, for example — keeps the database current.

- **Review the Notes field on frequently visited profiles** — outdated notes are worse than no notes because they create false confidence. A note that says `prefers text messages` from three years ago may no longer be accurate.

Related Sections

- 6.1.1 — Step 1: Create the bowler profile
- 6.1.8 — Common mistakes on the first ball and how to avoid them
- 8.1.6 — Data privacy and your bowler records
- 9.1.1 — Recommended Settings configuration for a new pro shop
- 9.1.2 — When to clone a spec sheet vs. create a new one
- 03.x — Bowlers (Clients): managing your bowler list

Tip: The best time to maintain the database is during the natural quiet moments of the shop day — the first fifteen minutes before opening, or the last few minutes before closing. Small, regular maintenance sessions prevent the kind of accumulated disorder that eventually requires a dedicated afternoon to untangle. A database that is checked briefly every week stays clean almost automatically.

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