

Data Entry and Record Updates Briefing

This guide is designed to help you spot tasks that can be handed over to a VA, what Jessanol would usually need from you, and what the end result could look like.

HOW THIS HELPS

Data entry and record updates are often the quiet admin jobs that keep everything else working. They may not feel exciting, but when records are out of date, duplicated or scattered, it can slow down follow-ups, reporting, client communication and day-to-day decision-making.

Jessanol can help keep business records accurate, organised and easier to rely on.

THIS IS USEFUL IF

This type of support may be useful if:

-  You have information sitting in emails, forms, spreadsheets or notes
-  Your records are out of date
-  You have duplicate contacts or inconsistent entries
-  You keep meaning to update a tracker but never quite get to it
-  You need information moved from one place to another
-  You want records to be cleaner before using them for follow-up, reporting or planning
-  You are not fully confident that the information in your system is current

WHAT JESSANOL CAN SUPPORT WITH

Jessanol can help enter, update and maintain business records.

This may include:

- Adding new records
- Updating existing records
- Correcting obvious formatting issues
- Transferring information from one system to another
- Checking for missing or duplicate information
- Keeping spreadsheets, trackers or databases up to date
- Highlighting unclear or conflicting information

RECOMMENDED RHYTHM

This can be done weekly, monthly or as needed depending on the amount of information being handled.

For example:

- Weekly record updates after enquiries, bookings or client activity
- Monthly spreadsheet or tracker updates
- A one-off clean-up before a campaign, launch or report
- Regular updates during an active project

ACCESS LIKELY NEEDED

Jessanol will probably need:

- Access to the relevant spreadsheet, database, CRM, LMS, finance platform or record system
- The source information that needs to be entered or checked
- Clear guidance on which system is the source of truth
- Any naming, formatting or category rules already used
- Guidance on what to do with missing or unclear information

IMPORTANT CONSIDERATIONS

Before starting, we will agree:

- Which records need updating
- Where the source information comes from
- Which system or spreadsheet should be treated as the main record
- What can be corrected directly
- What needs to be checked with you first
- How missing or conflicting information should be flagged

Sensitive or personal data should only be accessed and updated where there is a clear business need. Any unclear, missing or conflicting information should be queried rather than guessed.

STEP-BY-STEP INSTRUCTIONS

1. Confirm which records need updating.
2. Gather the source information from the agreed location.
3. Check the existing record before adding anything new.
4. Enter or update the information carefully.
5. Use agreed formatting for names, dates, categories and notes.
6. Highlight missing, unclear or conflicting information.
7. Check for obvious duplicates or errors.
8. Save or sync changes.
9. Confirm completion if required.

WHAT YOU NEED TO PROVIDE

To get started, you will usually need to provide:

- Access to the relevant record system, spreadsheet or database
- The information that needs adding or updating
- A short explanation of how records are currently used
- Any required categories, tags or fields
- Any formatting preferences, such as date formats or naming rules
- Guidance on what should be flagged rather than changed

The information does not need to be perfect before Jessanol can support you. Part of the work can be identifying what is missing, duplicated or unclear.

WHAT YOU'LL GET BACK

You should have:

- More accurate records
- Cleaner spreadsheets or databases
- Fewer duplicates
- Better visibility of missing information
- More reliable information for follow-up, reporting or planning
- Less time spent manually copying, checking and updating records

If this sounds familiar, we can use this as a starting point to work out what support would be most useful. Contact me: jane@jessanol.com