Merging duplicates in customer records · What to record?

For: Paušalni obrt · Obrtnici · j.d.o.o. · d.o.o.

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Applicability: According to the profile and circumstances of the described case.

Keep a record of the source, the dates of amendments and the reason why a particular piece of information was retained.

Record and working document

Try a few similar names with different addresses or contacts.

For an uncertain match, request a manual review before automatic linking.

Working example · Merging duplicates in customer records

Try a few similar names with different addresses or contacts.

Specific next steps

1. Try a few similar names with different addresses or contacts.
2. For an uncertain match, request a manual review before automatic linking.
3. Track how duplicates are created and prevent them in the enrolment form.

Limits of application

Apply the guideline to your documents and working methods.

Original page

https://adriatrends.hr/poslovni-vodic/en/pitanja/praksa-digital-crm-duplikati-dokazi