Merging duplicates in customer records · How to approach it?

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.

Determine the key by which two different people or entities can be distinguished before merging.

A starting point in practice

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

Try a few similar names with different addresses or contacts.

Working example · Merging duplicates in customer records

Try a few similar names with different addresses or contacts.

Specific next steps

1. Keep a record of the source, the dates of amendments and the reason why a particular piece of information was retained.
2. Try a few similar names with different addresses or contacts.
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

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