Merging duplicates in customer records · How to introduce the procedure into routine operations?

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.

Track how duplicates are created and prevent them in the enrolment form.

Regular application

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

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-primjena