Merging duplicates in customer records · What to do if the process gets stuck?

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.

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

When a plan meets an obstacle

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

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

Working example · Merging duplicates in customer records

Try a few similar names with different addresses or contacts.

Specific next steps

1. Determine the key by which two different people or entities can be distinguished before merging.
2. Keep a record of the source, the dates of amendments and the reason why a particular piece of information was retained.
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-problem