Merging duplicates in customer records · How to check this using an example?

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

Practical business guidance · Reviewed: 2026-11-22

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

Try a few similar names with different addresses or contacts.

Checking by example

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

Keep the record source, the dates of modifications and the reason why a given piece of data was retained. In cases of uncertain matching, request a manual review before automatic merging.

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. 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-provjera