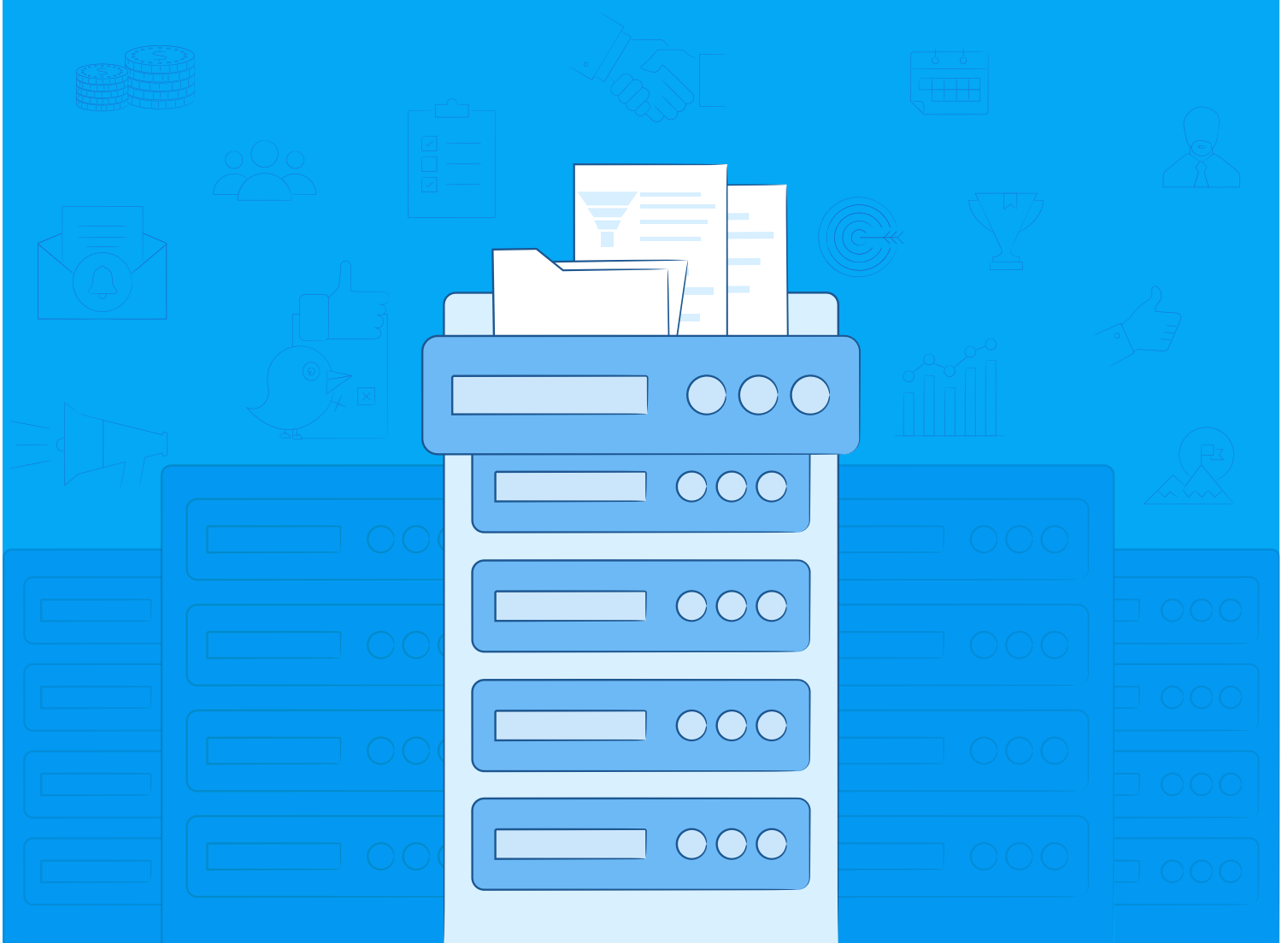


# Maintaining a Clean CRM Database



# Contents

- **How messy is your CRM Database?** 3
- **Managing duplicate records**
  - Arrest duplicates before they can be created 4
  - Merge duplicate records 4
- **Validating CRM data** 6
  - Automatic submission of records for manual approval 7
  - Data validation as part of a business process 8
- **Customize fields**
  - Mandate important sales information 9
  - Set maximum character limit for fields 9
- **Maintain a Style Sheet** 10
- **Use Roles for Security** 10

## How messy is your CRM Database?

One of the most challenging tasks in running a CRM system is ensuring the accuracy and validity of data in it. A poorly maintained set of data can cost a company in more ways than one - your activities are slowed down, you will have inaccurate reports and it's annoying to have to manually verify details of each record when you have more important activities to deal with.

For example, say you make a follow-up call to a customer, only to find out that another member of your team had already contacted them. That would be a little embarrassing but where was the confusion? After cross-checking it becomes evident that there was no previous record of a call being made to the contact. On further investigation, you discover that there was a duplicate copy of the same contact, assigned to another sales rep! Inaccurate or incomplete CRM data will hamper sales and marketing performances. Many of your contacts might have changed their phone number, email address or even their company, leading to an accumulation of outdated and incomplete data in your CRM.

Not just duplicates, you may have challenges with consistently managing the validity of data. For example, you allow only 20% discount on your products as per your organization's policy. But some of your sales reps are not aware of this policy or they get careless with it and enter a higher discount for some of their deals. If this happens, you have to manually attend to these exceptions and set things right. This is surely time-consuming and completely unnecessary. Besides, you don't want it to be too late before you catch these errors. If these errors are overlooked, then your sales reports may be flawed, leading to much bigger problems.

So there is definitely a need to maintain a **clean, organized and valid data set** in your sales database that also gets updated regularly. Read on to learn some effective ways by which you can do this in Zoho CRM.



Managing duplicate records



Validating CRM data



Customizing fields



Maintaining a style sheet



Using roles for security

## Managing duplicate records

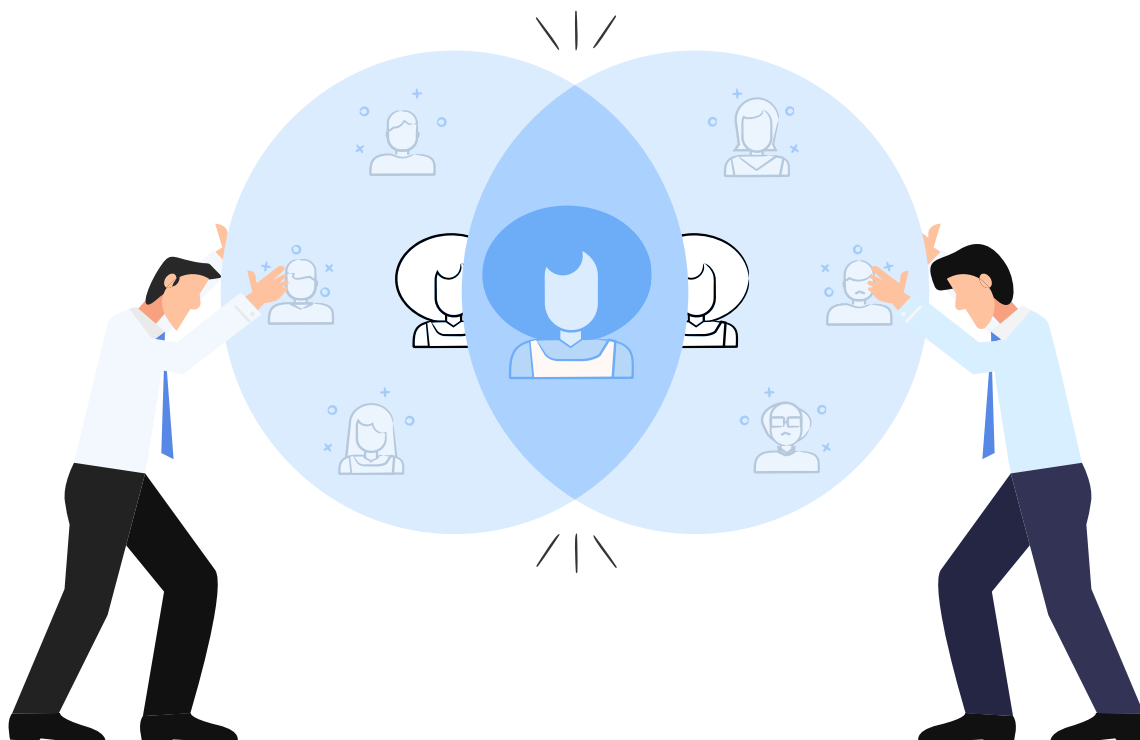
Zoho CRM offers proactive and reactive solutions to the problem of duplicate records.

### Arrest duplicates before they can be created:

By marking a certain field as a “unique field”, you can stop the creation of a duplicate record. This is a proactive way to maintain a clean database. For example, if you have marked **Phone Number** as a unique field in the Leads module, CRM will alert you if you create a new lead with the same phone number as an existing lead.

To mark a field as unique, you just have to select the “**Do not allow duplicate values**” option under that field’s settings.

### Merge duplicate records:



Despite creating unique fields and double checking data, if you still think there could be duplicate records in your CRM, you can use Zoho CRM’s de-duplication tools to merge them.

When you run a de-duplicate check, CRM will automatically merge records that are exact copies of each other. If there is a conflict, you must choose a Master Record, so the duplicates will be merged into the chosen master record.

**Example:**

A contact called David has been duplicated thrice. If all three records have the exact same values for all fields, then CRM will merge these automatically.

However, if the duplicates of the contact called David have different phone numbers, there is a conflict. You need to tell CRM which David is the master record. You could check David’s latest phone number and choose that as the master record so all the duplicates will be merged into this chosen record.

Apart from this de-duplication tool, Zoho CRM also comes with a Find and Merge Duplicates feature.

You will use the **Find and Merge Duplicates** option if you know exactly which record in a module has been duplicated and you wish to merge the same. Example, you know that a contact called James has duplicate copies and you want to merge them. You can simply go to James’s page and click Find and Merge Duplicates. You can manually select the records, set the master record and merge the copies.

**Here are some quick differences between “Find and Merge Duplicates” and “De-duplication” of records.**

Find & Merge Duplicate Records	De-duplicate Records
<p><b>When to use:</b> It is ideal to use this feature if you are specifically looking for a particular record’s duplicates.</p> <p><b>Example:</b> You know that a lead called “David Smith” has been duplicated and you wish to find and merge those copies.</p>	<p><b>When to use:</b> It is ideal to use this feature when you are not clear if there are duplicates in the first place and you want CRM to run a duplication check based on certain unique fields. You can run this tool periodically in your CRM to keep your modules free from duplicate records.</p> <p><b>Example:</b> You run a duplication check on the Leads module based on the Email field once a month.</p>

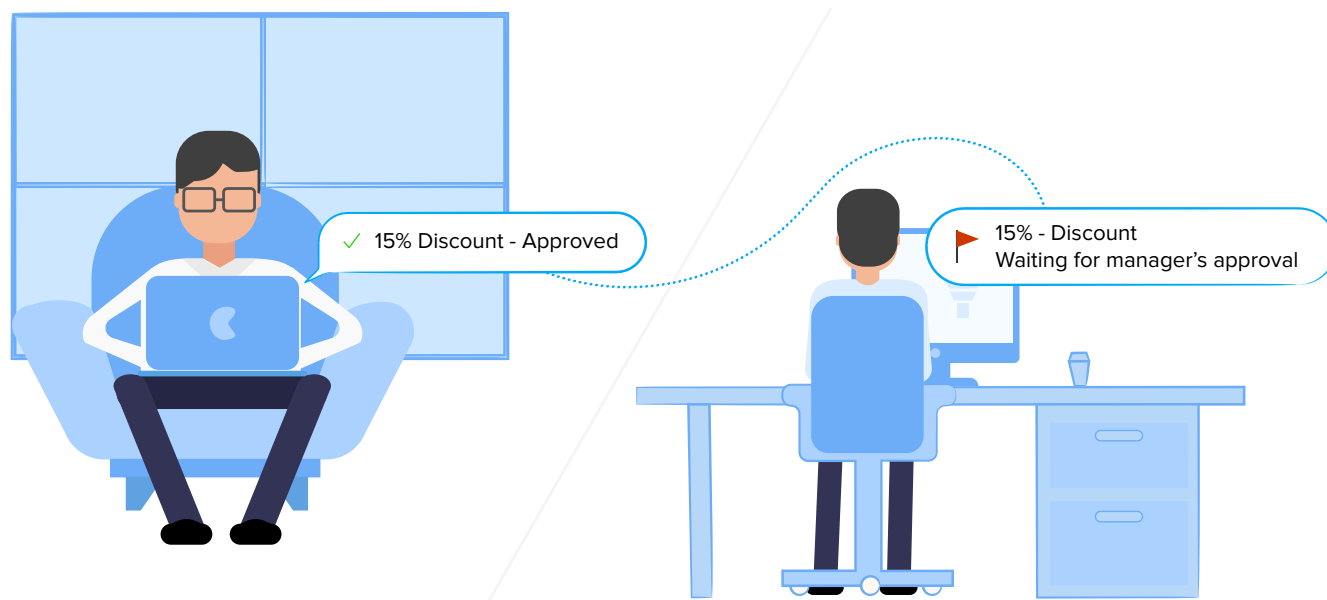
Find & Merge Duplicate Records	De-duplicate Records
<p><b>How it works:</b> Go to the specific record's Detail page and click the Find &amp; Merge Duplicates option.</p> <p>This will fetch the duplicate entries for that record.</p>	<p><b>How it works:</b> Go to the required module and click the De-duplicate tool from the module's list view. Then, select the fields based on which the duplicates must be searched.</p> <p><b>Example:</b> If you apply the De-duplicate tool on the Leads module and run the search based on Email and Company, CRM will search for all leads in which the Email and Company field values are exact copies.</p>
<p><b>CRM automatically</b> merges duplicate entries if they are exact copies of each other.</p> <p>In case of a conflict*, you must manually resolve the conflict to instruct CRM as to which record should be taken as the master record and merge the duplicates into the chosen master record.</p> <p><b>(*) Example of a conflict:</b> Assume there are two leads with the same names, company, but with different phone numbers. Here, the problem of conflicting phone numbers must be resolved manually.</p>	

## Validating CRM data

Besides clearing up duplicates, you need to be proactive and make sure that you don't let CRM accumulate junk in the first place. This means you need to figure out ways to validate the data that enters your CRM account.

Zoho CRM comes with a handful of features by which you can ensure the validity of data in it. This involves various efforts such as putting a process in place, setting access restrictions and automatic record submission for manual approval.

## Automatic submission of records for manual approval



As a sales manager you don't have the time to manually look at and verify every piece of information that goes into your CRM account, nevertheless, you want to have an eye out for some really important details such as the product discount percentage. For instance, whenever someone enters an unacceptable discount, you would want to be notified of it.

Zoho CRM comes with a solution to address this requirement where records that sales teams create could be automatically submitted for the approval of higher-ups, based on some customized criteria.

For example, if someone enters a discount of more than 25% for a deal, the record immediately gets locked and you are notified automatically. When it gets "locked", it means that it cannot participate in any CRM action until it's been approved. Once the people concerned have looked at and "approved" the deal, it gets back to CRM as an editable record. You can also automate some actions on approval or rejection - such as sending an email, making a field update, triggering web-hooks and custom functions.

So, this is one way by which you can stay informed about sensitive data that gets into a CRM if it is a cause for concern. Simply configure workflow approval processes with suitable criteria to have records submitted to you automatically for your approval.

## Data validation as part of a business process



When you add a record to CRM, it may be that you cannot fill all the fields of the record at one shot. For instance, while adding a lead, you see a field called Products interested in. At the moment, you are not very sure, but once you call up the lead and ask them what they are interested in, you will be able to fill this field. Similarly, you will be able to fill up a discount percentage for the deal, once you have had a discussion with your manager.

To put it in perspective, you are actually following a process here, and some details can only be entered at different stages of the process. In sales lingo, you may have stages such as lead qualification, negotiation, discount approval, contract stage and so on.

If this is your scenario, you can put a process in place in CRM. And at different stages of the process, you can have the system mandate and validate information required. As a record progresses through a process, CRM will prompt a user to enter required details contextually. As a result, when the record exits a process, you will have complete, valid information for that record.

**In Zoho CRM, you will create a business process using Blueprint, which helps you design and execute that process in a systematic manner. With Blueprint, you can:**

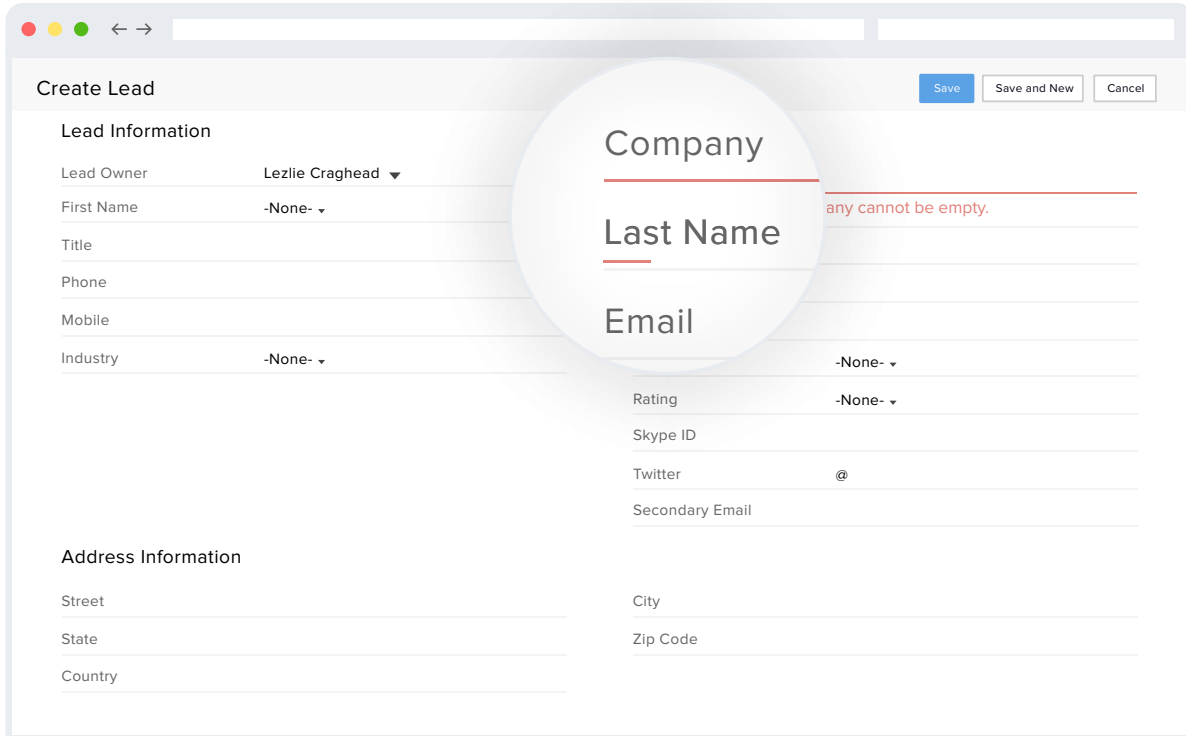
- Define every stage in a process and associate people with each stage
- Guide your teams through the execution of the process
- Mandate and validate important information contextually
- Automate routine actions



## Customize fields

You can customize a field based on the following settings.

- Mandate important sales information by marking the relevant fields as mandatory.
- Set maximum character limit for fields



The screenshot shows the 'Create Lead' form in Zoho CRM. The form is divided into two main sections: 'Lead Information' and 'Address Information'. A circular callout highlights the 'Company', 'Last Name', and 'Email' fields. The 'Last Name' field has a red error message: 'any cannot be empty.' The 'Save' button is highlighted in blue.

### Mandate important sales information

Another major problem with an unorganized data set is that you find a lot of fields that are incomplete. When you plan to send some legal documents via mail, you find that the Street information is missing in the Address section of the customer. This is a very inefficient way of doing things.

Avoid this situation by marking fields as mandatory in Zoho CRM. Once you do this, a user cannot save a record without filling all the mandatory information.

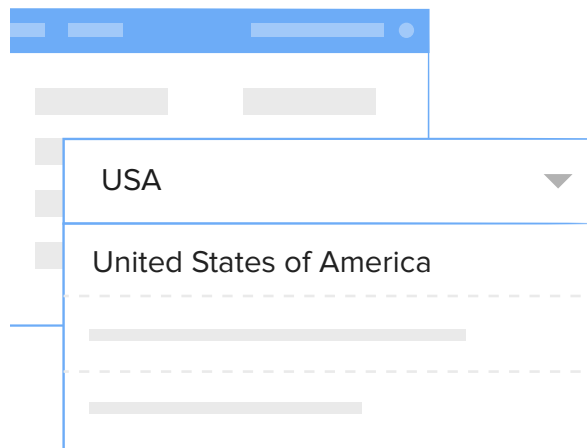
### Set maximum character limit for fields

Sometimes you may need to fill a field that's unique to your organization, example, an enrollment number which only comes with 8 digits. What if someone enters a 10 digit number here by mistake? If the system accepts it, you will again have inaccurate data.

While customizing a field in Zoho CRM, you can set a maximum characters allowed for text fields and maximum digits allowed for number fields to avoid this issue.

## Maintain a Style Sheet

While automation does most of the work, human efforts are essential to ensure the quality of data. One way to make data-entry easy and maintain consistency, is to introduce naming conventions. For example, a country's name is sometimes used in different formats: USA, US, United States of America. Having a standardized format for such data helps you generate accurate reports and filter records based on the exact criteria. Follow a style sheet with a list of abbreviations and standard data entry formats for address, company names, designations, etc. Pre-defined drop-down values also helps a lot in eliminating a small part of the problem.



## Use Roles for Security

With data pouring in from several sources and multiple users accessing it, maintaining a clean CRM database is not that easy. One best practice is to restrict access to data in your CRM account. Define Roles that will help you control the access rights of users while working with CRM data. That way, users will modify only those records that are relevant to them. While access is limited to only those who are responsible for it.

# Contact Us

## USA

- **California**

Zoho Corporation  
4141 Hacienda Drive, Pleasanton,  
California 94588, USA  
Phone : +1 877 834 4428 | +1 615 671 9025

- **Austin**

Zoho Corporation  
3910 S, IH 35, Suite 100, Austin,  
Texas 78704, USA

## INDIA

- **Chennai**

Zoho Corporation Pvt. Ltd.,  
Estancia IT Park, Plot No. 140 & 151, GST Road,  
Vallancherry Village, Chengalpattu Taluk,  
Kanchipuram District 603 202, INDIA  
Phone : +91 (44) 71817070 | +91 (44) 71817000  
+91 (44) 67447000

- **Tenkasi**

Zoho Technologies Pvt. Ltd.,  
Silaraipuravu Village, Mathalamparai,  
Tenkasi, Tirunelveli District 627 814, INDIA

## Zoho CRM Resources

[www.zoho.com/crm/resources](http://www.zoho.com/crm/resources)

