

SoftwareGlimpse CRM Cleanup Checklist

Updated: 15 Aug 2026

Project / CRM: _____
Owner / Team: _____
Date: _____

Clean the data without breaking the reports.

HOW TO USE THIS RESOURCE

- 1** Clear the safety gate
- 2** Batch one — users & ownership
- 3** Batch two — duplicates
- 4** Batch three — fields & views
- 5** Batch four — automations
- 6** Validate & schedule the next pass

Key: [] Pass [] Partial [] Fail [] Not tested | * = Must-have

Evidence: screenshots, recordings, official docs, written confirmation, or test results.

#	CHECK ITEM	WHY IT MATTERS	REQ	EVIDENCE	RESULT
1. BEFORE YOU TOUCH ANYTHING					
1.1	Dated export of accounts, contacts, deals, and activities	Without a snapshot, a bad merge batch is unrecoverable and the cleanup becomes the incident.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.2	Dependency list for every field and rule you may remove	A field feeding a report or an integration payload will break something invisible when it disappears.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.3	Merge survivorship rules written and agreed	Deciding survivorship mid-merge produces inconsistent records that are harder to fix than the duplicates were.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.4	Fixed validation sample chosen	Validating different records after each batch tells you nothing about what the batch actually changed.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.5	Freeze window announced to the team	Bulk imports or mass edits during cleanup will silently undo the work and corrupt the validation.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
1.6	Rollback approach written down	Deciding how to restore while a batch is failing is how a small problem becomes a long outage.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2. BATCH ONE — USERS & OWNERSHIP					
2.1	Open deals reassigned before their owner is deactivated	Deactivating first can orphan live pipeline in ways some systems make awkward to undo.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.2	Departed and unused user accounts deactivated	Dormant accounts are both a paid seat and an open access path nobody is monitoring.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.3	Accounts and contacts reassigned from inactive owners	Unowned accounts get no coverage, and coverage gaps are invisible until a renewal is missed.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.4	Ownerless records found and resolved	Records with no owner at all never appear in an owner-filtered view, so they are invisible to every routine.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T
2.5	Integration and API users reviewed	Service accounts from retired integrations keep write access long after anyone remembers why they exist.	*		☐ Pass ☐ Partial ☐ Fail ☐ N/T

#	CHECK ITEM	WHY IT MATTERS	REQ	EVIDENCE	RESULT	
2.6	Validation sample re-checked after batch one	Catching a reassignment error now is far cheaper than finding it three batches later.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3. BATCH TWO — DUPLICATE CONTACTS & ACCOUNTS						
3.1	Contact match rule defined with email as primary key	Name-based matching merges different people at the same company, which is close to unrecoverable.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.2	Account match rule defined on domain or normalised name	Domain matching catches the legal-entity and abbreviation variants that name matching always misses.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.3	High-confidence duplicates merged in small batches	Small batches keep any mistake small enough to inspect and reverse.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.4	Ambiguous matches routed to a human review queue	Auto-merging low-confidence matches is the fastest way to lose data nobody realises is gone.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.5	Open-deal survivorship applied on account merges	Merging accounts with open deals on both sides can duplicate or lose pipeline mid-quarter.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.6	Lead-to-contact duplicate policy set (or N/A)	Recycled leads recreate contacts on the same email and quietly rebuild the duplicate problem.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
3.7	Validation sample re-checked after batch two	Merge damage compounds — every later batch runs on whatever this one produced.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4. BATCH THREE — UNUSED FIELDS & VIEWS						
4.1	Removal candidates confirmed with the people who use them	Usage reports miss fields read only at quarter end or only by one team.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.2	Fields removed from layouts first, deleted later	The two-step makes the change reversible for the weeks in which someone notices it is missing.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.3	Obsolete picklist values retired with a mapping note	Removing a value without mapping the historical records breaks trend reporting silently.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.4	Abandoned list views and dashboards archived	Clutter buries the views the weekly ritual depends on and invites people back to private exports.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.5	Blank required fields on live open deals resolved	Open deals that cannot satisfy the current required set block sellers and generate workaround records.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
4.6	Key report views re-run after schema changes	A layout or picklist change can alter a report filter in ways only a comparison will reveal.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5. BATCH FOUR — ORPHAN AUTOMATIONS & TEMPLATES						
5.1	Every active automation given an owner or a disable flag	An unowned rule has nobody to notice when it starts firing on the wrong records.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.2	Customer-facing automations checked before anything else	A rule emailing closed-lost contacts damages relationships in a way internal noise never does.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.3	Orphan and failing rules disabled with a changelog entry	Disabling without a record means the next admin re-enables it without knowing why it was stopped.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
5.4	Noisy auto-task rules narrowed	High-volume tasks nobody completes train the team to dismiss every notification, including the useful ones.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T

#	CHECK ITEM	WHY IT MATTERS	REQ	EVIDENCE	RESULT	
5.5	Obsolete email and task templates retired	Old templates get sent by accident and carry outdated pricing, names, or positioning.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6. VALIDATE, DOCUMENT & MAKE IT RECURRING						
6.1	Full validation sample re-checked against the original snapshot	Final validation is the only proof the cleanup improved the data rather than merely changing it.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.2	Changelog published to the team	People who find a field missing without explanation assume the system broke and revert to spreadsheets.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.3	Deletion dates scheduled for everything currently disabled	A permanent limbo of disabled fields and rules is its own form of debt for the next admin.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.4	Prevention measures added for the top recurring problem	Cleaning without prevention guarantees the same batch work returns within a year.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.5	Next hygiene pass scheduled with a named owner	Hygiene without a calendar entry and an owner reliably becomes another multi-year backlog.	*		☐ Pass ☐ Fail	☐ Partial ☐ N/T
6.6	Retention and archive policy confirmed with the sponsor	Hard-deleting history you are required to keep is a compliance problem, not a tidy-up.	-		☐ Pass ☐ Fail	☐ Partial ☐ N/T

Completion guidance

Pass = done with evidence. Partial = in progress.
Fail = blocked. Not tested = deferred on purpose.

Evidence matters

Note owners, dates, and proof in Evidence / Notes so handoffs stay clear.

Work top to bottom

Finish must-have (*) rows before nice-to-haves.
Do not invent a Pass without proof.