



## TOOLS:

[ADVANCED SEARCH](#)

[BULK ACTIONS](#)

[QUICKLIST](#)

[CUSTOM EXPORT](#)

[CONTACTS BY DUPLICATE NAMES REPORT](#)

[ACTIVITIES](#)

**Observation:** Our clients' lives are constantly evolving. Whether it's buying a new home, celebrating a marriage, or changing cell phone numbers; keeping the CRM up to date requires diligent attention. Many times, contact data has been migrated to the CRM from a previous system, an excel spreadsheet, added manually, or a mixture of all three. Tackling contact cleanup is an ongoing process for your office. When planned accordingly, the monumental task of cleaning up contact data can become a part of your daily routine rather than a daunting project.

## Directions:

When approaching data cleanup in bulk, there are three methods.

### Method 1 - Bulk changes within Redtail:

This process is for changing the same field for many contacts to the same value all at once. An example would be updating many contacts' Status to "Client".

1. Gather a list of contacts that have a field that needs to be updated. Use the Advanced Search to start by casting the widest net. For example, if none of your contacts have Statuses, use the search: Contact Type is Equal to Individual. By default, when contacts are added they have one of Redtail's five Types; Individual, Business, Association, Trust, or Union.

[CONTACTS > ADVANCED SEARCH > SEARCH CRITERIA](#)

2. If all contacts in search results need a field changed to the same value, check the top checkbox to select all contacts resulting in the search. If selecting all contacts, make sure to "Select ALL X Contacts".
3. Once the contacts have been selected, Contact Options on the righthand side will become clickable.

[CONTACT OPTIONS > BULK ACTIONS > \\*SELECT ACTION\\*](#)

### Method 2 - Individual changes within Redtail:

The second method helps with updating information that is not the same for many records like birthdate, SSN, Client Since date, etc.

1. Gather a list of contacts that have information that needs to be updated.

[CONTACTS > ADVANCED SEARCH > SEARCH CRITERIA](#)

2. Save the search criteria as a Quicklist.

[ADVANCED SEARCH > SEARCH CRITERIA > RUN > SAVE](#)

3. Click into the first contact on the list and make any changes to the contact record. Use the "Next", "Previous", and "Return to Search" buttons in the top right corner to navigate to other contacts in that Quicklist/ Search.

### Method 3 - Bulk and individual changes outside Redtail:

And finally, the third method enlists an excel spreadsheet into the cleanup process. This is the best of the first two methods because information can be added in bulk or individually in the excel spreadsheet.

1. Decide what fields need to be audited or updated for contacts and create a Custom Export with those fields.

[MANAGE YOUR ACCOUNT > CUSTOM EXPORT TEMPLATES > NEW > SELECT FIELDS > SAVE](#)

2. Gather a list of contacts that have one or more fields that need to be updated and export them to the Custom Export Template.

[MORE >>](#)

[REDTAIL HOW-TO GUIDE 6](#)



# How to Handle Contact Cleanup (cont'd)

[CONTACTS](#) > [ADVANCED SEARCH](#) > [SEARCH CRITERIA](#) > [CONTACT OPTIONS](#) > [BULK ACTIONS](#) > [CUSTOM EXPORT](#) > \*NAME OF CUSTOM EXPORT\*

3. Update, add, and edit the information in excel for the contacts. Save any changes and send back to Redtail Support for the changes to be imported. Email address: support@redtailtechnology.com saying you have a spreadsheet with updated information to be imported- they will send a secure link for the file to be uploaded to.

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## Additional Cleanup Resources

It is not uncommon for there to be duplicate records of the same contact. This can be caused by an import, incorrect permissions, or contacts added by mistake. Check for duplicate contacts on a regular basis using the Contacts by Duplicate Names report.

[REPORTS](#) > [CONTACT REPORTS](#) > [CONTACTS BY DUPLICATE NAMES](#)

Completed activities become notes. Marking an activity completed also indicates that the action or event has been completed or taken place. Check for uncompleted activities that are scheduled in the past; these are referred to as "Past Due".

[TODAY](#) > [ACTIVITIES](#) > [FILTER TO "EVERYONE"](#) > [FILTER TO "PAST DUE"](#)

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**Result:** As you can see, cleanup through any of the methods above is as easy as 1, 2, 3! For best practice, Redtail recommends automating a part of this process by using a data audit workflow like the one included here.

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**Helpdesk Link:** <http://bit.ly/howtoRTU>



# Quarterly Contact Cleanup Workflow

Target date = First Wednesday of Calendar Year

## STEPS TASKS

### 1 QUARTER 1 (3 Months after target date)

- Client cleanup
- Lead/ prospect cleanup
- Other contact cleanup
- Contacts by Duplicate Names Report
- Audit Seminars
- Audit Opportunities
- Audit Workflows
- Audit Users & Teams
- Audit Team Notices
- Update Note & Activity Templates
- Update Workflow Templates
- Update Mail Merge Templates
- Update Automation Templates
- Update Style Guide

### 2 QUARTER 2 (6 Months after target date)

- Same tasks as Quarter 1

### 3 QUARTER 3 (9 Months after target date)

- Same tasks as Quarter 1

### 4 QUARTER 4 (12 Months after target date)

- Same tasks as Quarter 1
- Edit Contact Cleanup Workflow Template
- Open Workflow for new calendar year

## OUTCOMES

- Completed >> Quarter 2



- Completed >> Quarter 3



- Completed >> Quarter 4



- Completed  
>> **COMPLETE WORKFLOW ■**

*\*All of Redtail's best practice recommendations in these "How to Handle" documents are intended to provide a starting point for each office or database to develop their own processes from. These are not intended to comprehensively represent industry standards or compliance requirements. Terminology used in the examples may vary depending on the Database Lists, Templates, and other personalizations unique to each database.*