Efficient Data Capture and Management in CRM Systems

Transcript

Corrected October 23, 2026 to match the video word for word.

Introduction Printed on the Video Playback Page

In this video, I explain the process of capturing and managing data in CRM systems. I demonstrate how to use filters to streamline the viewing of relevant information, such as texts, notes, calls, and activities, while excluding redundant data like emails. I emphasize the importance of saving specific lead conversations as PDFs for future reference, particularly in cases of suspicious transactions. This selective approach ensures efficient data management without overwhelming the system with unnecessary information.

1. 00:00 Understanding Data Capture in CRM Systems

> So what teams are doing that need to absolutely capture the entire history with a contact, maybe a change of CRM, maybe you need it for different reasons, maybe you just need a hard copy away from your computer in case something happened. There's ways to go about this.

> So you take a lead. I grabbed [FirstName] here, a random lead I grabbed from your database, and we have a couple options here.

2. 00:19 Filtering and Viewing Relevant Information

> You have filters right here in your lead's timeline. This lets you turn off certain things, only view certain things as needed. So what most teams are doing, your emails are going to be already in your email address, so unless you are switching email addresses going to Salesforce, we don't need to have that check marked and have extra noise, but they are doing to like texts, notes, calls, and possibly activity. Activity would be like they came in from Ylopo or they came in from Zillow of whatever. They may be capturing that. That's all they have turned on.

> Then what they'll do is they'll go through and just expand any messages conversations out. Remember, we don't need to do your email. Email is already in your email address, so unless you're changing email addresses, no need to do email here in Follow Up Boss because those are retrievable any time in your email address because that's where it lives. It's just like the kind of being streamed to Follow Up Boss like a Netflix movie would be.

> So, once you have all your text conversations opened up. Granted, all your stuff will actually have the content. It won't say this. You'll actually see the content. We can't see your content in Follow Up Boss. This is hidden for privacy reasons, but you'll actually see the actual conversation on your side of things.

3. 01:26 Selective Saving of Lead Conversations as PDFs

> Once you have those all expanded out, if you're in Chrome, you just go to file and print and it will create this for you to work with. You just say save as PDF, and then I'll save as PDF for that lead.

4. 01:42 Strategic Data Management for Suspicious Transactions

> Again, most teams aren't doing this for every lead or every transaction they've had, but they're definitely doing it for those leads or clients that may have had a fishy transaction or something that's just wrong or off. Or maybe something comes down the lane later on that may not be good or possibly good. So they are doing it for those specific leads. But they are not doing for everybody.

> Let me know if that's helpful.